



# MAGIC SYSTEM MANUAL

**MARKEL<sup>®</sup>MARINE**



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## ACCESSING MAGIC

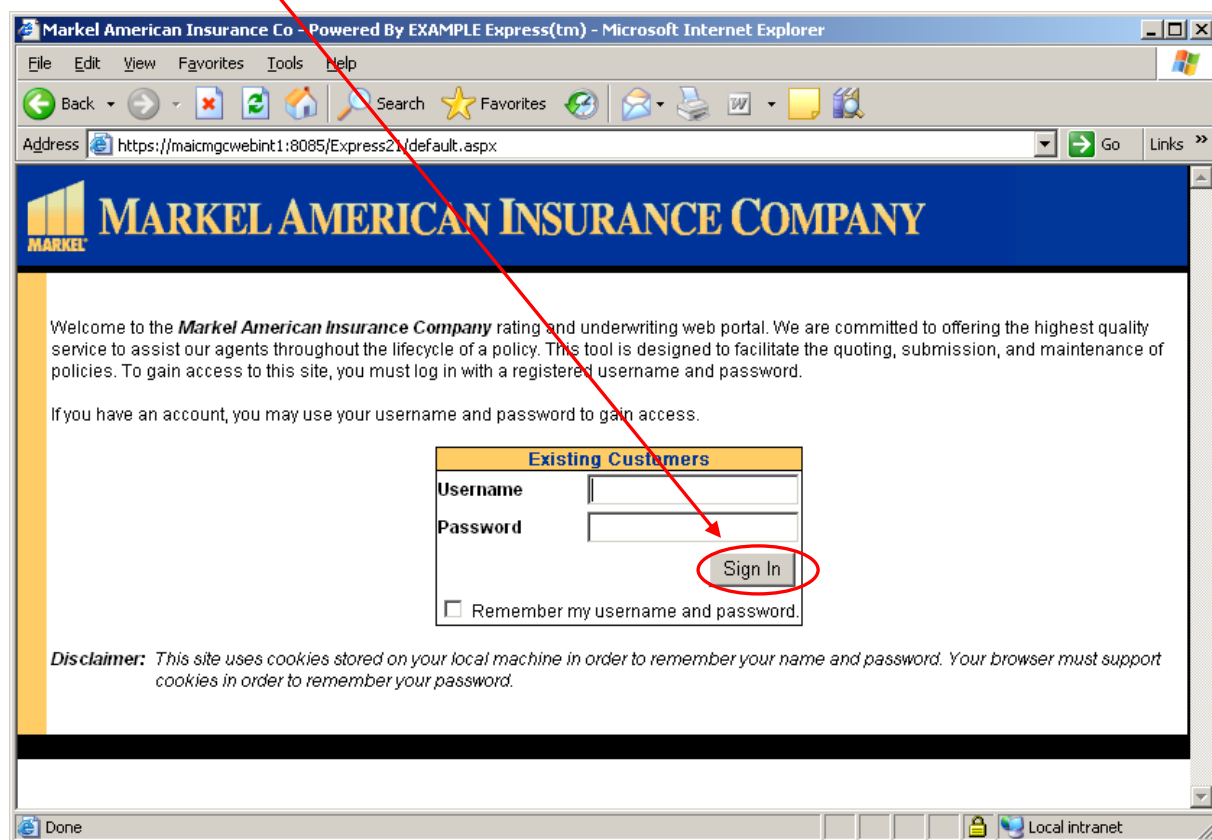
To gain access to the MAGIC site, open up a session on your internet browser. Type in the following URL <https://magic.markelamerican.com/magic>.

Press “ENTER” or “GO” and the MAGIC Welcome screen will appear as shown below.

## WELCOME SCREEN

An authorized username and password are required to log in to the MAGIC site.

1. Enter your “Username”.
2. Enter your “Password”.
3. Click the “Sign In” button.



The system will prompt a new User to change their password the first time they log in. See the section on Passwords for the required password format.

If you do not have a User account and need to have one set up, please complete the “Request to Amend Established User” form found at the back of this manual. All requests for new users must be completed by the General Agent.

Please email the completed form to [PTS@markelcorp.com](mailto:PTS@markelcorp.com) or Fax: 262-547-9436.

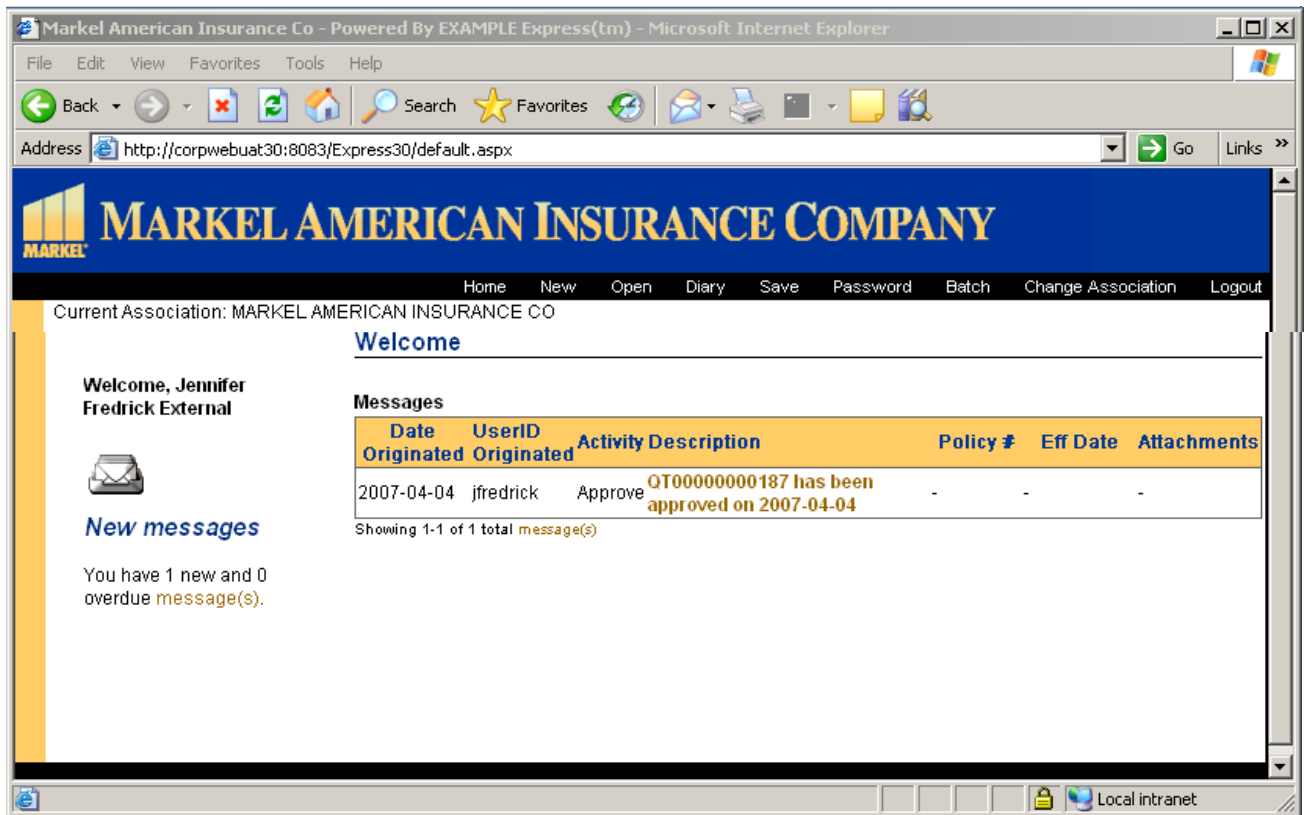
Once your user profile has been established, you will be emailed with a username and password to give you access to your account.

## NAVIGATION TOOL BAR

### HOME PAGE

Once logged in, the Home Page will display as shown below.

This screen will show any new and/or overdue messages that are in your Inbox. At any time while in the MAGIC system, simply click on “Home” and you will be brought back to this screen.



To retrieve/open a message in your Inbox, click on the description for that message. The description is displayed in a different color. If you hover over the description with your mouse, the description will be underlined. This is called a hyperlink. By clicking on this hyperlink, as directed above, you will retrieve the message, and a new screen (as shown below) will appear.

The message displays with a great deal of information much like an email. Of special importance is the middle section which shows the message/reason (see area outlined in green below).

**Reminder:** This message Inbox is not a private Inbox like email. This is simply a messaging system.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://maicmgcwebint1:8085/Express21/default.aspx

Current Association: AMERICAN UNDERWRITING MGORS AGCY INC

Message Details

Accept Message

Message Information

Create Date: 2007-04-04 16:10:02 Created By: jfredrick Closed Date: Closed By: System

Policy Information

Agency: American Underwriting Managers Client: John Dwyer Quote Number: QT00000000187

Message

Security Level: Public Activity/Reason: Approved Priority: Medium Due Date: N/A

Subject: QT00000000187 has been approved on 2007-04-04

Body: The transaction has been approved on 2007-04-04. Test reply.

Message Recipients

Category: Specified Agency Specified Agency Policy-Level Recipient: AMERICAN UNDERWRITING MGORS AGCY INC American Underwriting Managers N/A Policy/Client ID: N/A 2122

Date Attachments Caption FileName

File to upload: Browse...

Enter caption: Add Attachment

Load Policy Update Details Close

### Accept Message:

Upon clicking “Accept Message” and “Update Details”, the message will disappear from the other Inboxes that it was in. Other users will then be unable to retrieve the message to work on.

Once you have accepted the message you have taken ownership of it. You may then load the policy to work on it.

### Load Policy:

If the message originated from within a quote or policy, you may click the “Load Policy” button and this will take you directly inside the specific quote or policy.

### Delete Message:

Once you are through with the message, you may delete the message by clicking on the “X” button that appears to the right of the Message Recipients area.

### Update Details:

When drafting a message, clicking on update details is equivalent to sending the message.

### Add Attachment(s):

Just as in a regular email, you may also add an attachment (see area outlined in pink above).

**To add an Attachment:**

1. Click on "Browse".
2. Search your computer to find the document you'd like to attach.
3. Once you've found the document, click on the document name and then click on "Open".
4. In the "Enter Caption" field, enter the name of how you would like the attachment labeled.
5. Click "Add Attachment" to attach the file.

**Close:**

Clicking "close" just closes the message so that it can be viewed later.

## NEW

Clicking on “New” takes you to the new quote screen.

The screenshot shows a web browser window titled "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://corpwebuat30:8083/Express30/default.aspx". The page header features the Markel American Insurance Company logo and a navigation menu with links: Home, New, Open, Diary, Password, Batch, Change Association, and Logout. The main content area is titled "New Quote Selection" and "Current Association: MARKEL AMERICAN INSURANCE CO". A "New Quote" button is visible. Below this, there are sections for "Select the Agency and Producer", "Select the Product and Program", "Quote Effective Date", and "Enter the Risk Location ZIP Code and TAB out of field". The "Select the Agency and Producer" section includes dropdown menus for "General Agent" (with "(Select General Agent)" as an option), "Producer Name" (with "(Select Producer)" as an option), and "Producer Number" (with "\* N/A" as an option). A "Find Producer" button is also present. The "Select the Product and Program" section has a dropdown menu for "Product/Program:" (with "(select)" as an option). The "Quote Effective Date" section shows "2/14/2008". The "Enter the Risk Location ZIP Code and TAB out of field" section has a text input for "Location ZIP Code:" (with an asterisk indicating a required field) and a text input for "Location State:". The bottom status bar shows "Local intranet".

*For directions on how to process a New Quote,  
please see the section titled “Processing a New Quote” that follows.*

## OPEN

Clicking “Open” will take you to the screen where you can:

- search for an existing quote or policy
- search for items that have been sent for referral for your office to approve, decline, etc.

### Quick Search:

On the left hand side is a series of fields that are used in the Quick Search function. To quickly build a search filter, enter in a value or partial value, and/or select a value from the drop list. Then click the button to the right of each field you would like to search for. For example to search of the name “Smith,” you would enter “Smith” into the name field and click the name button. To narrow the search you could set the LOB to Markel Small Boat by selecting Markel Small Boat from the LOB drop down and pushing the “Set LOB” button.

### Advanced Search for a Quote or Policy:

On the right hand side is the Filter Builder which allows you to select the criteria you would like to use to search for an existing quote or policy. (see screen shot below)

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

MARKEL AMERICAN INSURANCE COMPANY

Home New Open Diary Save Password Batch Change Association Logout

Current Association: MARKEL AMERICAN INSURANCE CO

Open Existing Quote/Policy

Quick searches:

Name »

Quote/Policy # »

Set LOB

Set Agency

Quote Referral Service Request

Advanced Search

Name contains Add

Quick Query:

Current Filters

Show All

Apply Filter Clear Filter Save Filter

Show Deleted

Policy/Quote Number	Insured Name	State	Line	Status	Transaction	Description	Eff. Date	Last Modified
---------------------	--------------	-------	------	--------	-------------	-------------	-----------	---------------

To use the Filter Builder, use the drop down boxes to select the criteria you wish to filter on.

For example, say a new quote was started, and you can only remember the last name of ‘Smith’.

1. In the first drop down box, select “Name”.
2. In the second Drop down box, select “contains”.
3. In the third box, enter “Smith”.

You can also do partial searches on the insured name by following the instructions above and entering only part of the insured’s name.

Policy/Quote Number	Insured Name	State	Line	Status	Transaction	Description	Eff. Date	Last Modified
QT00000005039	DEREK SUEHR	PA	SmallBoat_SmallBoat	Quote	New-Pending		2007-07-22	2007-07-22
QT00000000225	sue cisz	ME	SmallBoat_SmallBoat	Quote	New-Pending		2007-04-05	2007-04-05
QT00000000228	sue cisz	ME	SmallBoat_SmallBoat	Quote	New-Pending		2007-04-05	2007-04-05
MSB00000003262	sue cisz	FL	SmallBoat_SmallBoat	Cancelled	Cancel-Committed		2007-06-26	2007-06-26
MSB00000003265	sue cisz	FL	SmallBoat_SmallBoat	Cancelled	Cancel-Committed		2007-06-26	2007-06-26
QT000000003860	sue cisz - test	FL	SmallBoat_SmallBoat	Quote	New-Pending		2007-06-26	2007-08-02
QT000000004493	Sue Nichols	CA	SmallBoat_SmallBoat	Quote	New-Pending		2007-07-10	2007-07-10

- Then click the “Add” button. This will move your selected criteria to the “Current Filters” section. (See screen print above.)
- Once you have selected all the items you wish to search on, click “Apply Filter” and the system will search for any matches to your criteria. (See screen print above.)

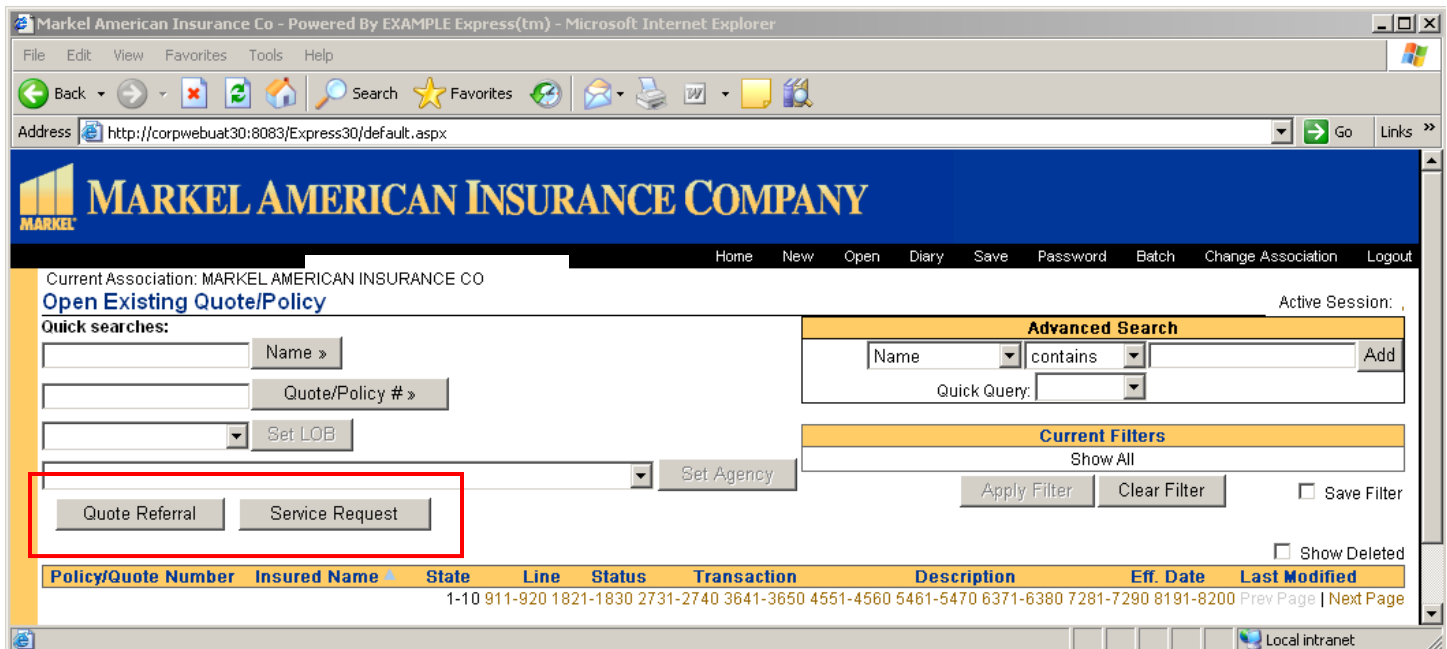
You may add multiple filters to narrow down your search results. Or you may delete filters by clicking on the “X” next to the filter criteria.

### Searching for Referred items:

In the middle of the screen there are 2 buttons that allow you to search for items that have been referred to your office for approval—Quote Referral and Service Request (see the area outlined in red below).

### Sorting Results:

Clicking on a blue column header will sort the results by the column. Click on the header again to reverse the order.



### Quote Referral:

The “Quote Referral” button allows you to quickly search for quotes that have been referred to your office for approval. When you click on “Quote Referral” a list of all the quotes that have been referred to your office will appear.

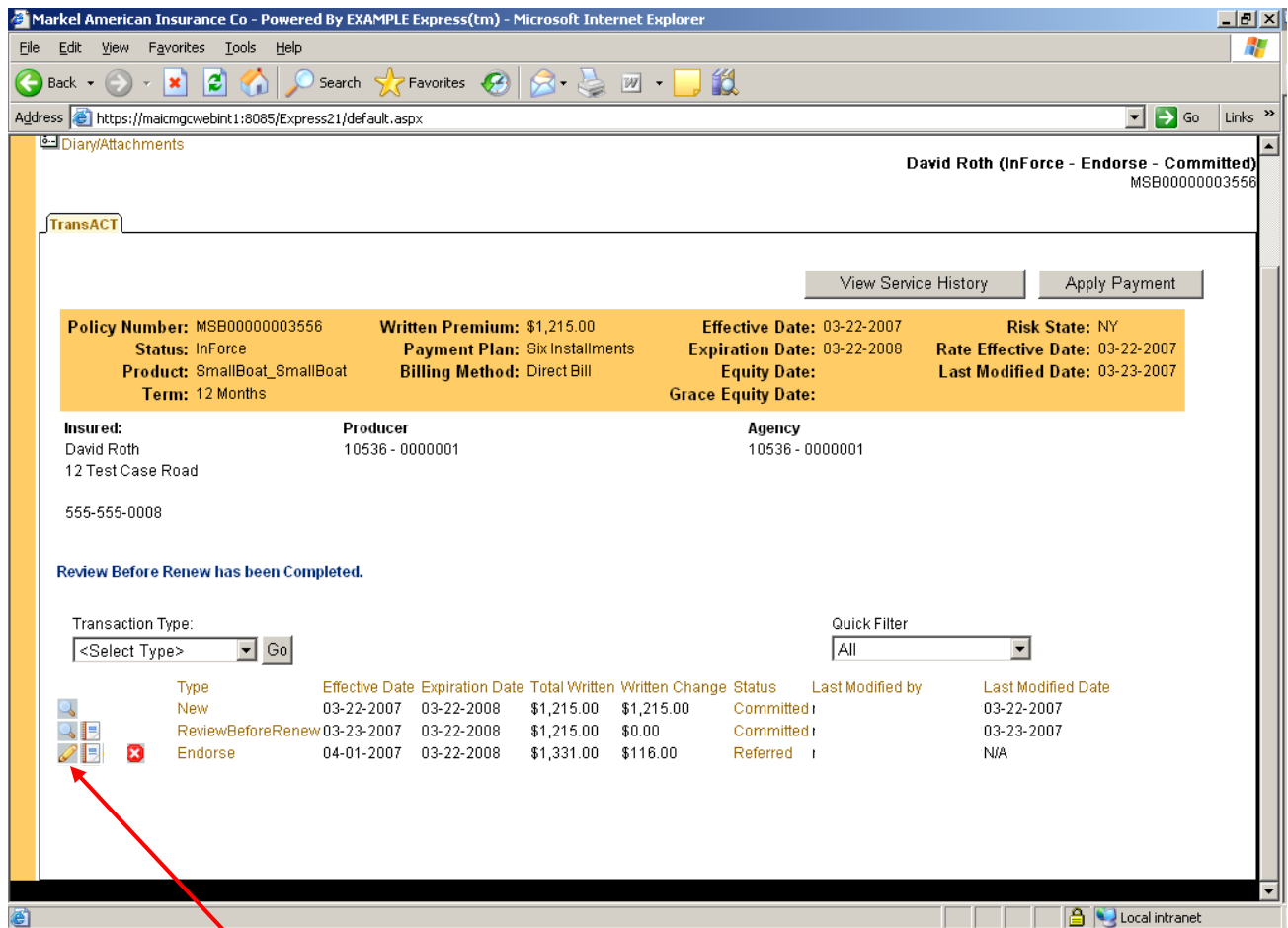
Click on the quote # to load the quote to work on it. Review the request and then proceed to the Submission page.

You will have the choice to Approve or Decline the risk or alternatively refer it to MAIC if you desire a 2<sup>nd</sup> opinion. Once you choose Approve, Decline or Refer, a message box will appear where you may add a message. Add the message and click OK. The risk will then be sent back to the requestor as Approved or Declined, or it will be sent to MAIC as a referral.

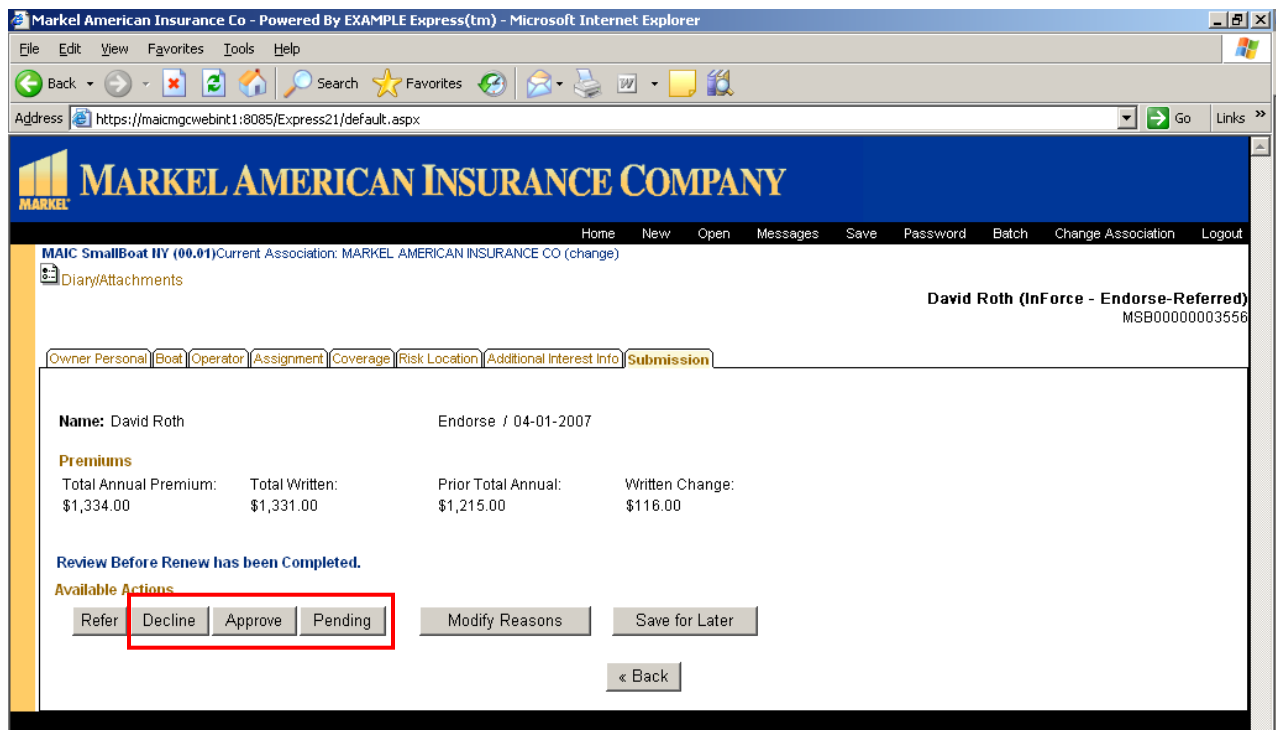
### Service Request:

The “Service Request” button allows you to quickly search for service items (i.e. endorsements, cancels, etc) that have been referred to your office for approval. When you click on “Service Request” a list of all the service items that have been referred to your office will appear.

Click on the policy number, you will be taken to the [TransACT screen](#).



Then click on the pencil. You will be taken into the policy to review it and modify it if necessary. Once you have completed your review, click on the Submission tab where you can Decline it or Approve it or put it in Pending status (see area in red below). If approved, the transaction must be committed at some point in order for it to take effect.



**MARKEL AMERICAN INSURANCE COMPANY**

[Home](#)
[New](#)
[Open](#)
[Diary](#)
[Password](#)
[Change Association](#)
[Logout](#)

Current Association: BOLTON AND COMPANY INC  
**Open Existing Quote/Policy**
Active Session: (none)

**Quick searches:**

**Advanced Search**  
 and  Name  contains    
 Quick Query:

**Current Filters**  
☒ Status contains  Quote   
  ☐ Save Filter  
☐ Show Deleted

Policy/Quote Number	Insured Name	State	Line	Status	Transaction	Description	Eff. Date	Last Modified
QT00000008365	ABC XYZ	WI	HPBoat_HPBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-02-12	2008-02-08
QT00000008523	AL DENTE	WI	HPBoat_HPBoat	Quote	New-Referred	GA: 10224 - 0000001	2008-01-21	2008-01-30
QT00000008438	AL DENTE	GA	HPBoat_HPBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-01-16	2008-01-16
QT00000008913	ANDY CAT	TX	HPBoat_HPBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-02-05	2008-02-05
QT00000009059	ANOTHER WEEK	TX	HPBoat_HPBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-02-11	2008-02-15
QT00000008994	BAT MAN	FL	HPBoat_HPBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-02-07	2008-02-07
QT00000009161	BEXAR COUNTY	TX	HPBoat_HPBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-02-13	2008-02-13
QT00000009540	BIG BOAT BENNY	TX	HYBoat_HYBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-02-22	2008-02-22

1-10 11-20 21-30 31-40 41-50 51-60 61-70 71-71 [Prev Page](#) | [Next Page](#)

## 1. View Details & History:

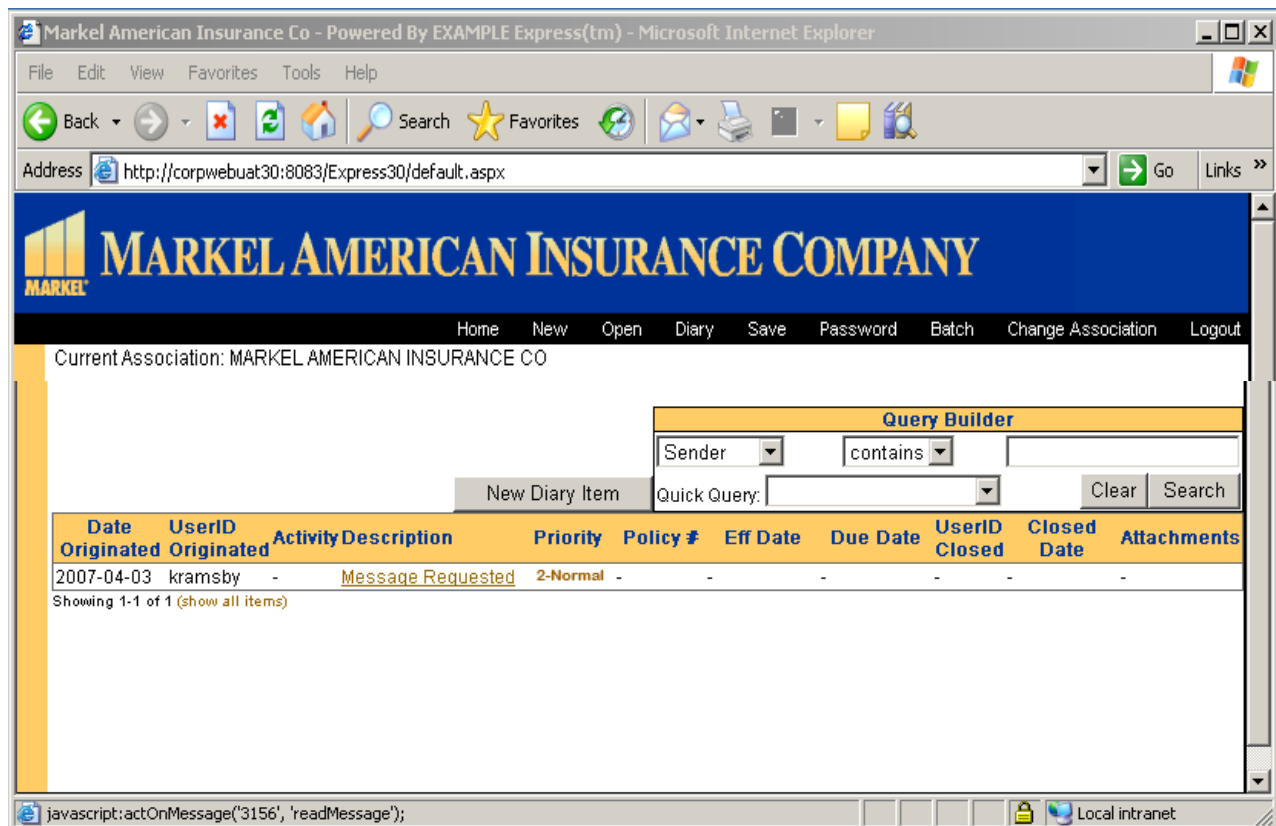
Clicking the “View Details & History” button will take you to the [Detail screen](#).

- Locked Policy:** The padlock icon will appear when another user has the file open/checked out. The name of the user who has it checked out displays on the bottom of the TransACT page.

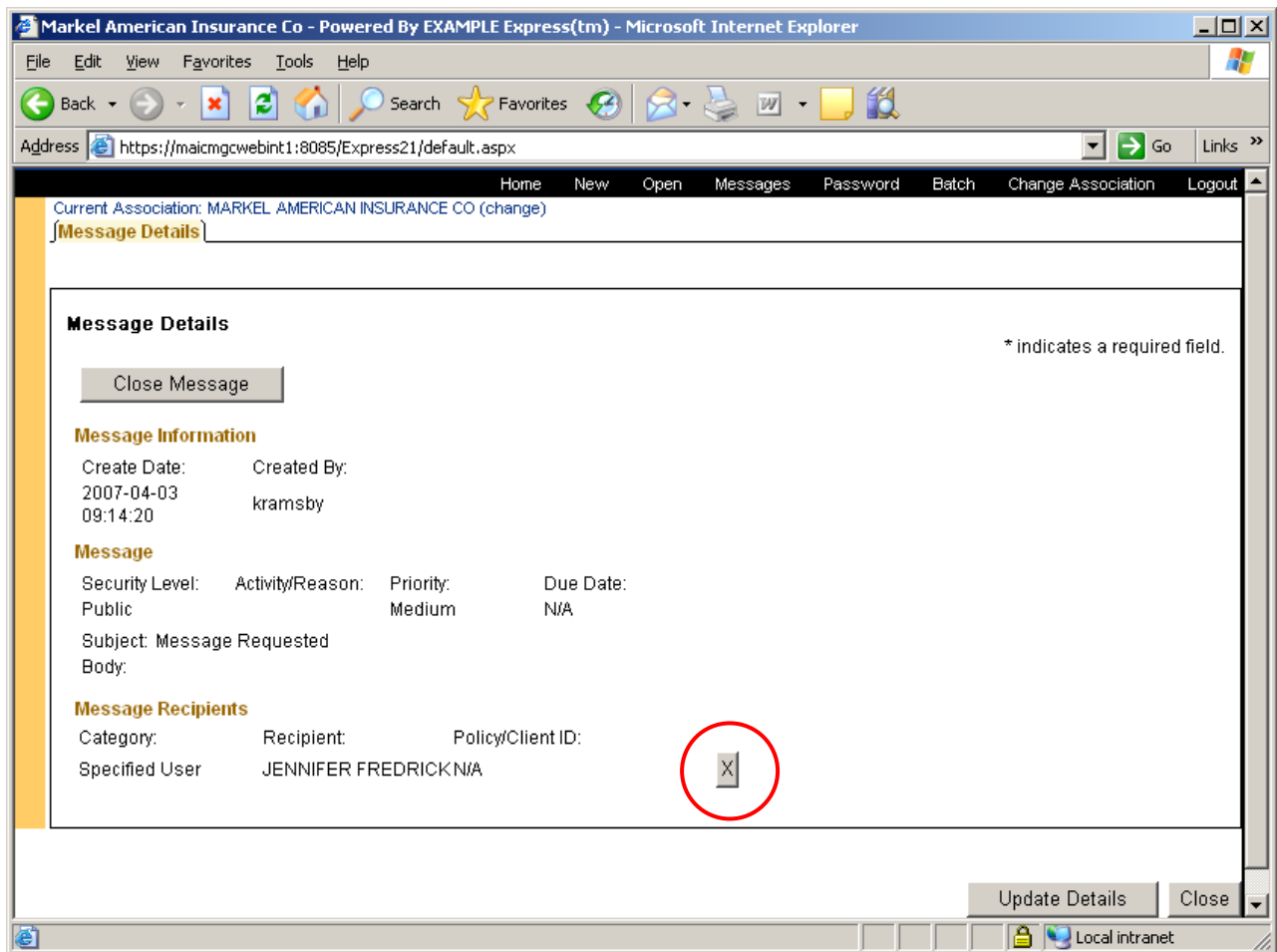
## DIARY

Clicking on “Diary” will take you to your Inbox.

To open a Diary Item, click on the bold description. (The description is displayed in a different color.) If you hover over the description with your mouse, the description will be underlined. This is called a hyperlink.



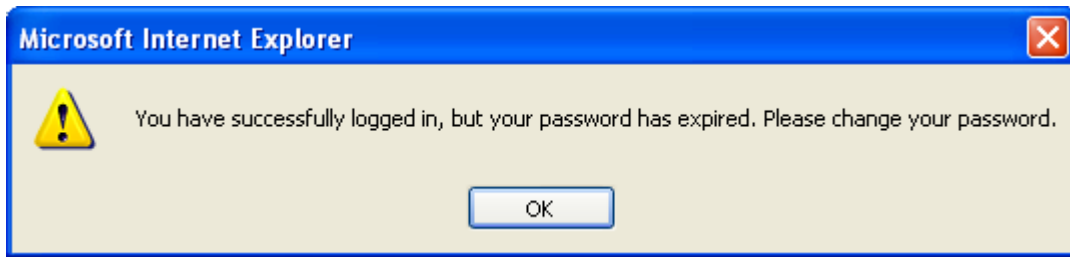
By clicking on this hyperlink you will retrieve the message, and a new screen will appear.



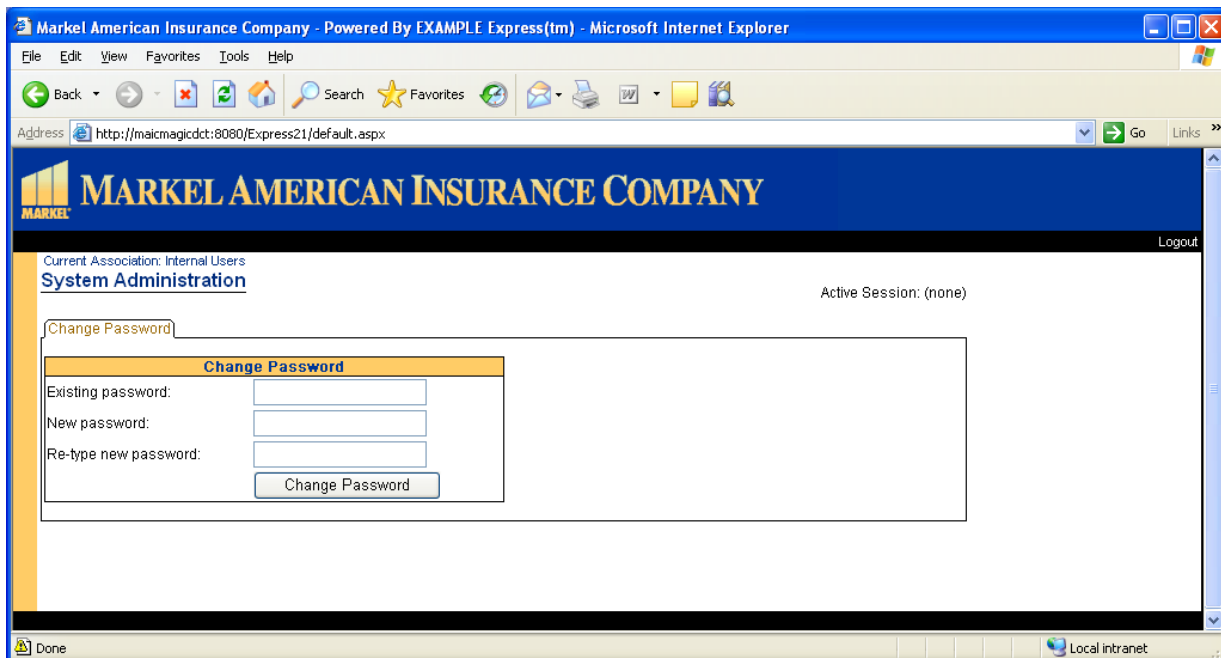
When you are finished with the message you may “close” the message, or click on the “X” to delete the message from your inbox (see the red circled area above).

## PASSWORD

The first time a new user logs in and every 90 days after that, the password will expire. The following message will appear:



1. Click "OK". The Change Password Screen will appear as shown:



2. Enter in your old password.
3. Determine what your new password will be based on the following rules:
  - The password cannot contain the user's first name, last name or login
  - It cannot contain spaces
  - Must be at least 10 characters long
  - 1 upper case, 1 lower case, one numeric and one special character must be included
  - Cannot match the previous password

**Ex.**   Badgers.2007  
         Alabama!99  
         HAPPY2cu2#

4. Enter in your new password following the guidelines above, and then enter in your new password again.
5. Click “Change Password”.
6. If the password change is complete you will receive the following message:



7. You may now proceed as normal.

If you do not have a User account and need to have one set up, please complete the “Request to Amend Established User” form found at the back of this manual. All requests for new users must be completed by the General Agent.

Please email the completed form to [PTS@markelcorp.com](mailto:PTS@markelcorp.com) or Fax: 262-547-9436.

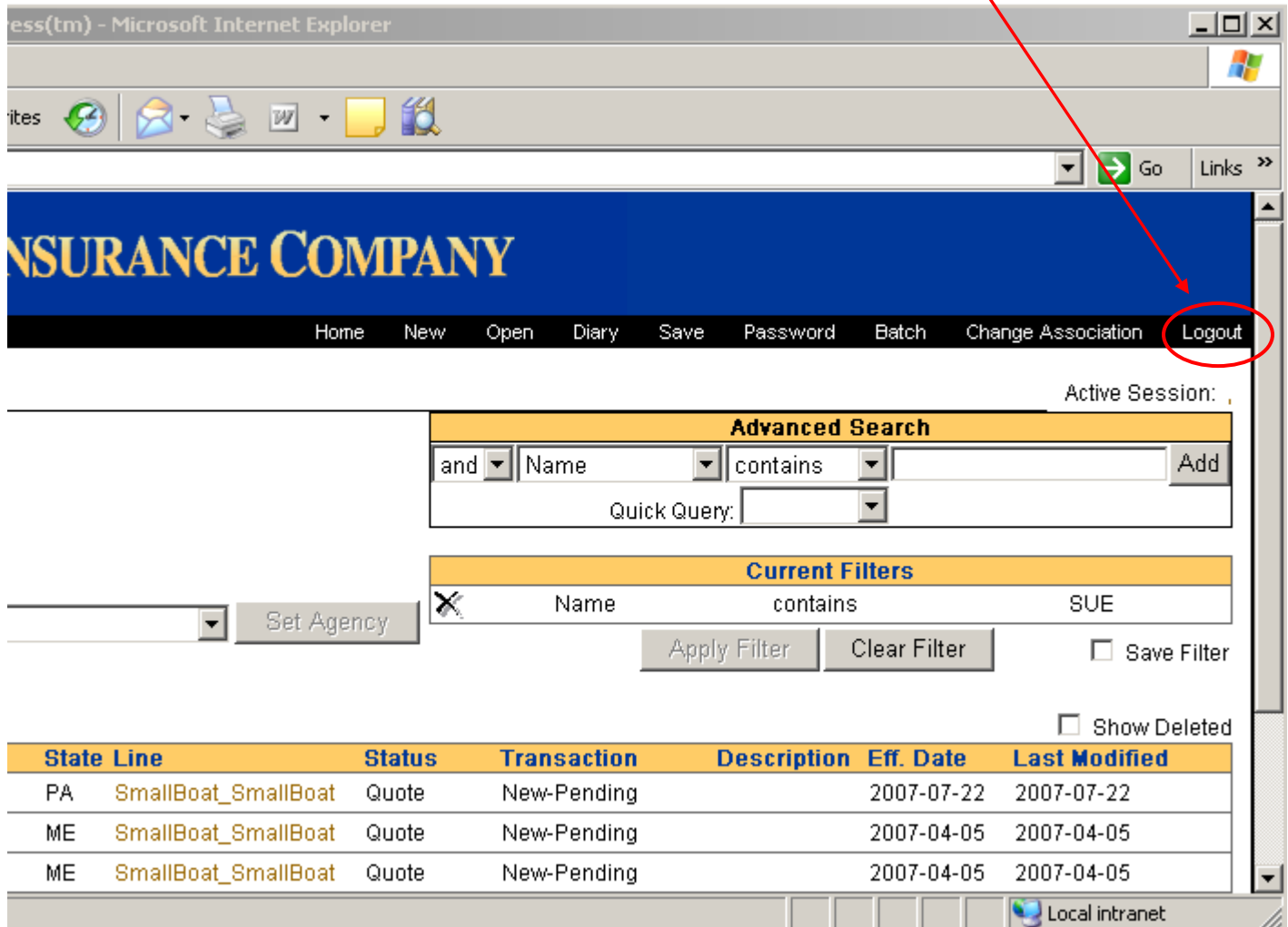
Once your user profile has been established, you will be emailed with a username and password to give you access to your account.

## LOGOUT

Clicking on “Logout” will log you out of the system.

You will then need to close your internet browser session to be completely out of the system.

To close your internet browser session, click the red “X” in the upper right-hand corner.



## PROCESSING A NEW QUOTE

### GENERAL NOTES:

- Pay attention to the type of boat you are quoting and follow the appropriate procedures. Special procedures for certain boats are outlined in these instructions, especially on the [Boat Screen](#) and [Coverages Screen](#).
- To process a new quote in MAGIC, the user will go through a series of screens completing all fields with an asterisk (\*) or as prompted by the system. Asterisked fields will be colored in yellow. To complete an issuance, the user will have to complete all the asterisked fields, as well as all the blue colored fields.
- Do not use the ampersand (&) symbol as it will cause an error.
- All quotes are good for 60 days. Once a quote expires you will see a Reset Quote Tab, unless the quote has been left in an approved status. If this occurs you will need to re-pend the quote to receive the reset quote button.
- Wherever there is a drop down box, you can repeatedly type the first letter of the word to find your selection or you may click the drop down arrow and scroll to your selection.
- It is not necessary to type the slashes and dashes in phone numbers, dates of birth, etc. Simply click the "Tab" key and the field will be automatically formatted.
- Cat capacity/bind restriction rules have been built into the system at the beginning of the quote process. You will receive a warning that quote can only be bound with a Wind Exclusion Endorsement or without hull coverage. You will be able to proceed to rating and will be able to either issue the policy with the exclusions OR choose to refer to company to remove the wind exclusion.
- You may use the **Next** button or **Back** button to click from page to page in order, or you may click on the appropriate tab that you need to go to. Click the **Save for Later** or **Exit** Buttons to save what you are doing and work on something else.

**Safety Equipment**

CO Detector <input type="checkbox"/>	Fire Suppression <input type="checkbox"/>	High Water Alarm <input type="checkbox"/>	Sea Key <input type="checkbox"/>	VHF <input type="checkbox"/>
Depth Finder <input type="checkbox"/>	EPIRB <input type="checkbox"/>	GPS <input type="checkbox"/>	Radar <input type="checkbox"/>	

Save For Later

Previous Boat | Next Boat

< Back   Next >

Local intranet

Upon starting a quote a unique quote number will be assigned. At any time, the quote may be exited and retrieved later as the quote is automatically saved throughout the quoting process.

Depending on each user's authority, the quote process will vary slightly.

**Sub-Producer:**

- May only process a quote indication in the Markel Small Boat program. Markel High Performance and Markel Helmsman Yacht quotes will need to be processed by the GA.
- Must refer all quotes for approval.
- The GA approves the quote, issues the policy and applies the 1<sup>st</sup> payment (if applicable).
- The GA performs the policy maintenance.
- The sub-producer may apply subsequent payments and a renewal payment if a credit card is used as the form of payment.

**Note: If the Sub-Producer works through the Markel Marine Service Center, the referral is sent to MAIC. MAIC then approves issues and performs all maintenance.**

**General Agent:**

- If the risk is over their authority, the GA may only process an indication of premium. The risk must then be referred to MAIC for approval.
- If the risk is within their authority, the GA may process the quote, issue the policy, apply all payments and perform all maintenance.
- Any transaction outside the GA's Authority will be identified by the system and referral will be required.

## MAIN SCREEN

To begin a new quote, click on “New”. This will take you to the first screen of the new quote process.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://maicmgcwebint1:8085/Express21/default.aspx> Go Links

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Messages Password Logout

**New Quote Selection** Current Association: AMERICAN UNDERWRITING MGRS AGCY INC

Main

\* indicates a required field.

**1. Select the Agency and Producer**

General Agent: AMERICAN UNDERWRITING MGRS AGCY INC \* Producer Name: (Select Producer) \* Producer Number: +N/A Find Producer

**2. Select the Product and Program.**

Product/Program: (select) \*

**3. Select Effective Date.**

Effective Date: 04-09-2007

**4. Enter the Risk Location Zip Code and TAB out of field.**

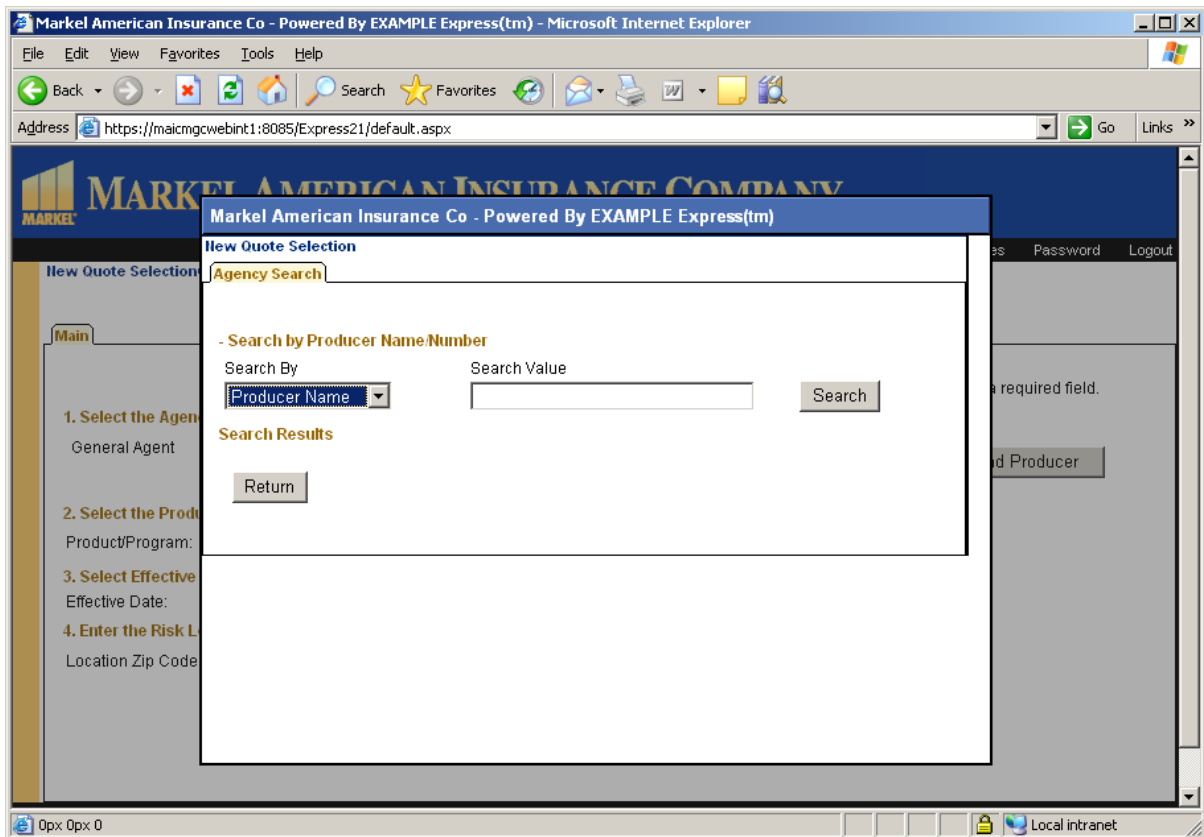
Location Zip Code: \* Location State:

### 1. Select the Agency & Producer:

When you log in, your Agency will automatically be listed as the “General Agent”.

If there is a Producer you would select the Agency’s name from the drop down list located under “Producer Name”. Once you select the Agency from the list, their Producer Number will appear to the right.

If the Producer information is uncertain, click the “Find Producer” button. The following screen will appear:



Using the Find Producer feature, you are able to search by the Producer Name or the Producer Number. There must be a sub-producer selected in order to continue.

## 2. Select the “Product/Program”:

Select the appropriate Product/Program to quote from the drop down box. SmallBoat\_SmallBoat refers to Markel Small Boat, HPBoat\_HPBoat refers to Markel High Performance and HYBoat\_HYBoat refers to Markel Helmsman Yacht.

**Note: Selecting Markel High Performance or Markel Helmsman Yacht will produce additional fields. Refer below for more information.**

## 3. Effective Date:

The Quote Effective date will default to today's date.

**Note: The policy effective date can be set at time of issuance. Failure to have the correct effective date at issuance will require the policy to be canceled and re-issued.**

## 4. Zip Code:

Enter the Zip Code of the location where the risk is moored. Hit “TAB” or click on the screen and the location state will populate

When the zip code is entered, the system will check to ensure that MAIC is accepting new business in that area at the current time. If not, the user will be notified accordingly.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://maicmgcwebint1:8085/Express21/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Messages Password Logout

**New Quote Selection** Current Association: AMERICAN UNDERWRITING MGRS AGCY INC

Main

\* Indicates a required field.

**1. Select the Agency and Producer**

General Agent: AMERICAN UNDERWRITING MGRS AGCY INC \*  
 Producer Name: American Underwriting Managers \*  
 Producer Number: +90199 - 0000001  
 Find Producer

**2. Select the Product and Program.**

Product/Program: SmallBoat\_SmallBoat \*

**3. Select Effective Date.**

Effective Date: 04-09-2007

**4. Enter the Risk Location Zip Code and TAB out of field.**

Location Zip Code: 49935 \*  
 Location State: MI

Start Quote

Done Local intranet

The system will also not allow the quote to continue if a zip code is entered in which your Agency is not licensed to do business with MAIC or if your Agency's current license for that state is not on file.

### Markel High Performance and Markel Helmsman Yacht only:

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Messages Password Logout

**Select the Agency and Producer**

General Agent: (Select General Agent) \*  
 Producer Name: (Select Producer) \*

**Select the Product and Program**

Product/Program: HYBoat\_HYBoat \*

**Quote Effective Date**

2/12/2008

**Application Status**

Renewal of current Markel American policy? No \*

**Enter the Risk Location ZIP Code and TAB out of field**

Location ZIP Code: \*  
 Location State: \*

**Select Mooring Location**

Country: US \*

**Clearance**

NOTE: The risk will not be reserved for you until you generate a rate.  
 If the owner is or has had this boat insured with Markel within the last 30 days or has had it quoted with Markel by another producer within the last 60 days, you need to contact the Marine Team in order to proceed.

Personal or Corporate/ Trust Ownership? Personal \*

First Name: \*  
 Last Name: \*  
 Date of Birth: \*  
 Year of Boat: \*

Local intranet

### 5. Application Status (Markel High Performance and Markel Helmsman Yacht only):

If the policy is going to be a renewal of a current Markel American policy, select “Yes.”

**6. Clearance (Markel High Performance and Markel Helmsman Yacht only):**

Enter in your information to reserve the risk for 60 days. Be sure to fill out all required fields.

**7. Mooring Location (Markel Helmsman Yacht only):**

Select between Canada, Mexico and the U.S. as mooring countries.

If all required fields are acceptable, the “Start Quote” button will appear.

Click on “Start Quote” to proceed. You will be taken to the [Product Eligibility Screen](#).

## PRODUCT ELIGIBILITY SCREEN – MARKEL SMALL BOAT ONLY

The [Product Eligibility Screen](#) contains 4 questions that are designed to either prevent the quote from continuing or alter the way the screens are displayed in the quoting process.

The screenshot shows a web browser window titled "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://corpwebuat30:8083/Express30/default.aspx". The page header features the Markel logo and the company name "MARKEL AMERICAN INSURANCE COMPANY". Below the header is a navigation bar with links: Home, New, Open, Diary, Save, Password, Batch, Change Association, and Logout. The main content area is titled "MAIC SmallBoat WI (01.01) July, 2007 Current Association: MARKEL AMERICAN INSURANCE CO". On the right side, it says "(Quote - New-Pending)". The "Product Eligibility" tab is selected. Below the tab, there are four input fields: "Origin Code", "Prospect ID", "Source Of Business" (a dropdown menu showing "(select)"), and "Conversion Renewal" (a checkbox). To the right of these fields is a note: "\* Indicates a required field". Below the input fields are four questions, each with "Yes" and "No" radio buttons, all of which are currently selected to "No":  
1. Will this boat be used for other than Private Pleasure?  
2. Is this boat titled in the name of a corporation or business?  
3. Is this unit Leased?  
4. Is this unit being held for Sale?  
At the bottom right of the form is a "Continue" button. The browser's status bar at the bottom shows "Done" and "Local intranet".

All of the radio buttons are currently defaulted to "No". Please ensure that the questions are ultimately answered correctly based on the applicant's information.

Answering "yes" to Question #1 will prevent the quote from continuing.

Answering "yes" to Question #2, will automatically change the [Owner Screen](#) to reflect questions to be answered by a Corporate representative.

Answering "yes" to Question #4 will deliver an error message that the risk is ineligible.

Once all 4 questions have been answered, click "Continue" to proceed to the [Special Notices Screen](#).

### Conversion Renewal:

This button should only be used by the direction of MAIC. It is used when rolling a book of business to MAIC.

## SPECIAL NOTICES SCREEN

The [Special Notices Screen](#) provides the applicable Fraud Warning as well as a disclosure regarding Insurance Score use.

**NOTE:** It is the responsibility of the agent to review this information with the applicant *prior to starting a quote.*

Both boxes need to be checked to confirm that the information displayed has been communicated to the applicant. When both boxes have been clicked a “Continue” button will appear.

Upon clicking “Continue” the user is attesting that this information was disclosed to the applicant and the user will proceed to the [Owner Screen](#).

The screenshot shows a web browser window titled "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "https://maicmgcwebint1:8085/Express21/default.aspx". The page header features the Markel American Insurance Company logo and navigation links: Home, New, Open, Messages, Save, Password, Logout. Below the header, the page displays "MAIC SmallBoat MI (00.01) Current Association: AMERICAN UNDERWRITING MGRS AGCY INC" and a "Diary/Attachments" link. The main content area is titled "Special Notices" and contains two sections: "Special Notices:" and "Insurance Credit Score:". Each section includes a text box with a disclosure and a checkbox labeled "\* I confirm compliance with Disclosure Requirements". A "Continue" button is located at the bottom of the form. A note at the top right of the form states "(Quote - New-Pending)".

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Mail Print Address Book

Address <https://maicmgcwebint1:8085/Express21/default.aspx> Go Links >>

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Messages Save Password Logout

MAIC SmallBoat MI (00.01) Current Association: AMERICAN UNDERWRITING MGRS AGCY INC

Diary/Attachments

(Quote - New-Pending)

**Special Notices**

**Special Notices:**

**Fraud Warning:**

It is a crime to knowingly provide false, incomplete or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines, and denial of insurance benefits. Your state may have specific warnings against filing false claim information.

☒ \* I confirm compliance with Disclosure Requirements

**Insurance Credit Score:**

To offer an accurate quote in connection with this application for insurance, we will review the unit owner's credit report or obtain or use a credit-based insurance score based on the information contained in that credit report. We may use a third party in connection with the development of the unit owner's insurance score. Future reports may be used to update or renew insurance.

☒ \* I confirm compliance with Disclosure Requirements

Continue

Done Local intranet

**Note:** Sub-Producers who quote in MAGIC will see a 3<sup>rd</sup> disclosure notice reminding them that they are acting as a representative of the applicant, etc. (See screen shot that follows.)

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Mail Print Address Book Favorites

Address http://maimagicdct:8080/Express21/default.aspx

**Special Notices**

\* indicates a requirement

**Special Notices:**

**Fraud Warning:**

It is a crime to knowingly provide false, incomplete or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines, and denial of insurance benefits. Your state may have specific warnings against filing false claim information.

☐ \* I confirm compliance with Disclosure Requirements

**Insurance Credit Score:**

To offer an accurate quote in connection with this application for insurance, we will review the unit owner's credit report or obtain or use a credit-based insurance score based on the information contained in that credit report. We may use a third party in connection with the development of the unit owner's insurance score. Future reports may be used to update or renew insurance.

☐ \* I confirm compliance with Disclosure Requirements

**SubProducer Agreement**

I recognize that I am acting on behalf of the applicant or policyholder as their broker and that I am not acting as the agent or broker for Markel American Insurance Company (Markel). Moreover, I have specifically explained to the applicant or policyholder that I am acting on their behalf as their broker and that I am not the broker or agent for Markel. I recognize and agree that no implied or expressed authority has been granted to me by Markel or any of their representatives or employees. I recognize that this system is only a means to transfer information and any change or request that I make on this system is not to be construed as an acceptance by Markel of the change or request and that only Markel can make that decision and that it must be made expressly by Markel, in writing, in order of the change or request to be legally binding.

☐ \* I understand and agree to the terms herein.

Done

Sub-producers must check the box acknowledging the 3<sup>rd</sup> notice in order to proceed with processing the quote.

When all 3 boxes have been clicked a "Continue" button will appear.

Upon clicking "Continue" the user is attesting that this information was disclosed to the applicant and the user will proceed to the [Owner Screen](#).

## OWNER SCREEN

The [Owner Screen](#) is designed to capture the required information regarding the owner(s) of the vessel. Accuracy of the information entered on this page is critical to ensure that an insurance score is able to be obtained.

**Note:** Be aware that screens for Markel High Performance Boats and Markel Helmsman Yachts will differ. Refer to addendums below.

Although it is not a requirement to obtain/enter the Social Security number of the owner, the Social Security number is the best means of securing the insurance score.

**Reminder:** The insurance score can have a favorable impact on the overall rate. Therefore, obtaining a Social Security number in the quote process can turn out to be very beneficial for the applicant.

If during the quoting process our Insurance Score provider is not accessible, no rate will be delivered and the quote will need to be re-processed later.

The screenshot shows a web browser window titled "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://corpwebuat30:8083/Express30/default.aspx". The page has a navigation bar with tabs: "Owner Personal" (selected), "Boat", "Operator", and "Assignment". A status bar at the top right says "(Quote - New-Pending)".

Below the navigation bar, there is a button "Add Additional Owner" and links "Previous Owner" and "Next Owner". A note on the right says "\* Indicates a required field".

The form is titled "First Named Insured" and contains the following fields:

- First Name (required)
- Middle Initial
- Last Name (required)
- Suffix (dropdown menu)
- Date of Birth (required)
- SSN
- Primary Phone
- Secondary Phone
- Fax Number
- E-Mail Address
- Mailing ZIP (required)
- Mailing Address 1 (required)
- Mailing Address 2
- City/County (dropdown menu, required)
- Mailing State

At the bottom of the form, there are links "Previous Owner" and "Next Owner", and two buttons: "Change Ownership Type" and "Save For Later".

The address information entered here is considered to be the mailing address location. (The mooring location is captured during the issuance process.) If during the quoting process the insured's address is amended or the Social Security number is added the system will automatically re-pull the insurance score.

### Add Additional Owner:

If there is more than one owner of the vessel, please click the “Add Additional Owner” button. Upon doing so, an additional set of fields to complete will display.

### Adding a Spouse:

If there is a spouse that needs to be listed as an owner, add the spouse via the “Add Owner Information” button. Do not add a spouse's name with the first name of the first owner entered. (i.e. John & Sandy) Doing so will result in an insurance score not being found, and this could have a negative impact on the overall premium charged.

### Corporate Ownership:

If the vessel is titled in a Corporate Name and this was indicated on the [Product Eligibility Screen](#), the [Owner Screen](#) will appear as shown below.

### Change Ownership Type:

However, if Corporate ownership was not realized until later in the quoting process, selecting the “Change Ownership Type” button will change the screen from the Personal Ownership fields to the Corporate Ownership fields.

The screenshot displays a web browser window titled "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://corpwebuat30:8083/Express30/default.aspx". The page header features the Markel logo and the company name "MARKEL AMERICAN INSURANCE COMPANY". Below the header is a navigation bar with links: Home, New, Open, Diary, Save, Password, Batch, Change Association, and Logout. The main content area is titled "MAIC SmallBoat WI (01.01) July, 2007 Current Association: MARKEL AMERICAN INSURANCE CO". It includes a "Diary/Attachments" link and a status indicator "(Quote - New-Pending)". The form is divided into sections: "Owner Corporate", "Boat", "Operator", and "Assignment". The "Owner Corporate" section contains fields for Corporation Name, Corporate Designee First Name, Corporate Designee Last Name, Primary Phone, Secondary Phone, Fax Number, E-Mail Address, Mailing ZIP, Mailing Address 1, Mailing Address 2, City/County (a dropdown menu), and Mailing State. Asterisks (\*) indicate required fields. At the bottom of the form are buttons for "Save for Later", "Change Ownership Type", and "Next »".

**NOTE:** On corporately titled risks an insurance score will not be obtained. Client entertainment is permitted, however, commercial use is not allowed.

Once all ownership information has been entered, click “Next” to proceed to the [Boat Screen](#). You may also change back to Personally owned, if required, by clicking the “Change Ownership Type” button again.

### Markel High Performance and Markel Helmsman Yacht:

Markel High Performance and Markel Helmsman Yacht [Owner Screens](#) will have additional buttons and fields. (See below)

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://corpwebuat30:8083/Express30/default.aspx> Go Links

Last Name  \*

Suffix

Date of Birth  \*

SSN

List Spouse ☐

Primary Phone  \*

Secondary Phone

E-Mail Address

Mailing ZIP  \*

Mailing Address 1  \*

Mailing Address 2

City/County  \*

Mailing State

Validate Address

Is address provided same as residence street address? ☐

Book Roll? ☐ (Do not check unless MAIC approved book roll)

Previous Owner | Next Owner

Change Ownership Type Exit

Next >

Done Local intranet

### Address Same as Residence?:

Check this box if the mailing address given is the same as the owner’s residence address.

### Book Roll:

Check this box only if MAIC has approved book roll.

## Validate Address:

This button brings up the Address Validation screen. It automatically validates the address that you entered on the screen previous against a USPS database, however, you can enter in a different address if you'd like.

The screenshot shows a Microsoft Internet Explorer browser window displaying the Markel American Insurance Company website. The address bar shows the URL: `http://corpwebuat30:8083/Express30/default.aspx`. The page title is "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer".

The main content area displays the "MAIC HYBoat WI (00.01)" form. The "Validate Address" button is highlighted. The "User Entered Address" section shows the following information:

- Address 1: 111 E. WATER
- Address 2:
- City/County: Appleton/Outagamie
- State: WI
- ZIP: 54911

The "Validated Address Information" section shows the following information:

- The address has been successfully validated.
- A validated match has been returned. Select Accept to keep the validated address.
- Validated Address: 111 E WATER ST APPLETON, WI 54911-5796

Buttons for "Cancel", "Validate", and "Accept" are visible. The "Accept" button is highlighted.

The left sidebar contains the "Owner Personal" section with fields for First Name, Middle Initial, Last Name, Suffix, Date of Birth, SSN, List Spouse, Primary Phone, and Secondary Phone. The right sidebar contains the "Quote - New-Pending" section with the text "QT00000009135 - HYBoat N UNDERWRITING MGRS" and a note "Indicates a required field".

## BOAT SCREEN –MARKEL SMALL BOAT

In lieu of commenting on each field entered on the [Boat Screen – Markel Small Boat](#), only those fields that require special attention will be noted below. The two screen shots that follow provide a complete view of the [Boat Screen](#).

**Note:** This section pertains to Markel Small Boat ONLY. For Markel High Performance and Markel Helmsman Yacht, refer to their respective sections.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail W Word Excel Links

Address http://corpwebuat30:8083/Express30/default.aspx Go

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Diary Save Password Batch Change Association Logout

MAIC SmallBoat WI (01.01) July, 2007 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

(Quote - New-Pending)

Owner Corporate **Boat** Operator Assignment

Add Boat

\* Indicates a required field

Previous Boat | Next Boat

Boat 1 of 1

**Enter Unit Information**

Manufacturer (select) \* Make Not Found ☐ Year  \* Model

Hull Type (select) \* Hull Material (select) \* Propulsion (select) \*

Length  \* Speed  \* Total Weight: Boat & Engine  Calculated Speed: 0

**Engine(s)**

Number Of Engines 1

Engine Manufacturer  Year  Horsepower  \* Model  Type Gasoline \* Clear

**Auxiliary Engine**

Year  Make  Model  Horsepower  Clear

Local intranet

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

**Auxiliary Engine**

Year Make Model Horsepower

Purchase Price \* Purchase Date \* (MM/YYYY) Total Value: Watercraft & Equipment w/ Engines \*

Navigational Territory Distance: from Owner's Residence

Please enter a valid zip code and select a city/county for this state.

Zip Code 54911 \* Location City/County (select) \* State: WI

**Safety Equipment**

CO Detector ☐ Fire Suppression ☐ High Water Alarm ☐ Sea Key ☐ VHF ☐

Depth Finder ☐ EPIRB ☐ GPS ☐ Radar ☐

Save For Later

Previous Boat | Next Boat

« Back Next »

Local intranet

### Make Not Found:

Upon clicking “Make Not Found”, the manufacturer field will become a field in which you may enter free form text. Please do not use the ampersand sign (&) when entering the manufacturer name. Doing so will cause an error, for example “C & J Marina” should be added as “C and J Marina” All vessels entered as “Make Not Found” will require referral for approval prior to binding.

### Add Boat:

If there is more than 1 boat to be quoted, upon completing the [Boat Screen](#) for the first boat, click on “Add Boat”. This will bring up a blank boat screen where the 2<sup>nd</sup> boat’s information should be entered.

The “Add Boat” function can be used an infinite number of times.

If at any time you need to revert to the previous boat’s information, click on “Previous Boat” (as shown below, circled in red).

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Diary Save Password Batch Change Association Logout

MAIC SmallBoat WI (01.01) July, 2007 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

(Quote - New-Pending)

Owner Corporate **Boat** Operator Assignment

\* Indicates a required field

Add Boat

Previous Boat | Next Boat

Boat 2 of 2

**Enter Unit Information**

Manufacturer (select) \* Make Not Found Year Model

Hull Type (select) \*

Hull Material (select) \*

Propulsion (select) \*

Length \* Speed 0 \* Total Weight: Boat & Engine Calculated Speed: 0

**Engine(s)**

Done Local intranet

### Delete Boat:

If more than one boat is entered, a "Delete" button will appear at the bottom of the screen.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

**Auxiliary Engine**

Year Make Model Horsepower

Clear

Purchase Price \* Purchase Date \* (MM/YYYY) Total Value: Watercraft & Equipment w/ Engines \*

Navigational Territory (select) \* Distance: from Owner's Residence \*

Please enter a valid zip code and select a city/county for this state.

Zip Code 54911 \* Location City/County (select) \* State: WI

**Safety Equipment**

CO Detector ☐ Fire Suppression ☐ High Water Alarm ☐ Sea Key ☐ VHF ☐

Depth Finder ☐ EPIRB ☐ GPS ☐ Radar ☐

Delete

Previous Boat | Next Boat

Save For Later

« Back Next »

Done Local intranet

Clicking “Delete” will delete the current page’s boat information. The delete function is not enabled if there is only one boat listed on the quote.

Once all boat information has been entered click “Next” to proceed to the [Operator Screen](#).

## BOAT SCREEN – MARKEL HIGH PERFORMANCE

In lieu of commenting on each field entered on the [Boat Screen – Markel High Performance](#), only those fields that require special attention will be noted below. Yellow fields are required to be filled to obtain the quote; blue fields are required to be filled to bind the quote. The two screen shots that follow provide a complete view of the Boat Screen.

**Note:** This section pertains to Markel High Performance boats ONLY. For Markel Small Boats or Markel Helmsman Yacht, refer to their respective sections.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://corpwebuat30:8083/Express30/default.aspx> Go Links »

Owner Personal **Boat** Operator Assignment Loss Payee Info Coverage

\* Indicates a required field

Add Boat

Previous Boat | Next Boat

Boat 1 of 1

---

**Enter Unit Information**

Year Length Manufacturer Make Not Found Model

2000 \* \* (select) \* ☐ \* Speed Calculator

Hull Type Hull Material Total Weight: Boat & Engine Speed Hull ID # (HIN)

Traditional V \* Fiberglass \* \* \* \*

---

**Engine(s)**

# of Engines 2 Drive Type I/O Sterndrive \* Drive Description

Year Engine Manufacturer Total Horsepower Type

\* \* \* Gasoline \* Clear

---

**In Season Location**

Location Type Location Name Lay Up Type

(select) \* \* None

Distance from Owner's Residence \* \*

ZIP \* \*

Address 1 \*

Address 2

City/County (select) \*

State WI

Local intranet

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail New Window

Address http://corpwebuat30:8083/Express30/default.aspx Go Links >>

Purchase Price \* Purchase Date \* (MM/YYYY) Total Value: Watercraft & Equipment w/ Engines \*

---

**Navigation**

Navigational Territory (select) Port Risk (Select) View Nav

---

**Survey**

Date Surveyed Surveyor Name

---

**Safety Equipment**

Propeller Hub Locks ☐ Auto Fire Extinguisher ☐ High Water Alarm ☐ Monitoring System ☐  
 Trailer Ball or Axle Locks ☐ Outboard/Outdrive Locks ☐ Electronic Burglar Alarm ☐ Radar ☐

---

**Trailer**

Add Trailer

---

**Boat House**

Add Boat House

---

Exit

Previous Boat | Next Boat

« Back Next »

Local intranet

### Make Not Found:

Upon clicking "Make Not Found", the manufacturer field will become a field in which you may enter free form text. Please do not use the ampersand sign (&) when entering the manufacturer name. Doing so will cause an error, for example "C & J Marina" should be added as "C and J Marina" All vessels entered as "Make Not Found" will require referral for approval prior to binding.

## Speed Calculator:

Clicking “Speed Calculator” will bring up the Speed Calculator window.

The screenshot shows a web browser window titled "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://corpwebuat30:8083/Express30/default.aspx". The main content area displays the "MARKEL AMERICAN INSURANCE COMPANY" logo and a sidebar with navigation links: "Owner Personal", "Boat", "Operator", and "Assignment". The "Boat" link is selected, and the "Add Boat" button is visible. The main content area shows "MAIC HPBoat WI (00.01) Current Association: M" and a "Diary/Attachments" link. The "Speed Calculator" window is open, displaying the following information:

**MAIC HPBoat WI (00.01)**

**Speed Calculator**

**Enter the values to Calculate the Speed.**

Horse Power:

Weight (lbs):

Constant:

Calculated Speed:

Hull Type	Constant
Heavy V bottom	225
Fast V bottom	250
Catamaran - Pleasure Type	275
Fast Catamaran	300

The background application shows a "R B (Quote - New-Pending)" section with the text "QT00000009104 - HPBoat" and "WRITING MGRS - AMERICAN UNDERWRITING MGRS". A note indicates "\* Indicates a required field". The "Speed Calculator" button is visible in the background application.

**Enter Unit Information**

Year: 2000 \* Length: 20 \* Manufacturer: Adrenaline \* Make Not Found: ☐ Model: 12 \* **Speed Calculator**

Hull Type: Other \* Hull Material: Fiberglass \* Total Weight: Boat & Engine: 2000 \* Speed: \* Hull ID # (HIN): \*

---

**Engine(s)**

# of Engines: 2 \* Drive Type: I/O Sterndrive \* Drive Description: \*

Year: \* Engine Manufacturer: \* Total Horsepower: \* Type: Gasoline \* **Clear**

---

**In Season Location**

Location Type: Commercial Storage \* Location Name: \* Lay Up Type: None \* Distance from Owner's Residence: \*

### Drive Type:

Enter the type of drive used by the boat engine(s). If further explanation is required, enter the information in the Drive Description field.

### Total Horsepower:

Enter the combined horsepower of all engines on the boat.

### Clear:

Pressing the “Clear” button will clear all the fields in the Engine section, as well as set all drop down lists to their default setting.

### Lay Up Type:

Selecting a value other than “None” from the drop down list will cause more fields to be displayed. (Outlined in red) Fill in the appropriate values for the new fields.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

**In Season Location**

Location Type: Place of Business \* Location Name: \*IDOL INC \*

Distance from Owner's Residence: 20 \* ZIP: 32408 \*

Address 1: 123 FIRST STREET \* Address 2: \* City/County: Panama City Beach/Bay \* State: FL

Lay Up Type: On Lift \* From (MM/DD): \* To (MM/DD): \*

LocationType: (select) \* Location Name: \* ZIP: \*

Purchase Price: 95000 \* Purchase Date: 05-2006 \* (MM/YYYY) Total Value: Watercraft & Equipment w/ Engines: 95000 \*

**Navigation**

Navigational Territory: GM- Key West to Brownsville Limit: \* Coastal Off-Shore: up to 25 \* Port Risk: (Select) View Nav

Done Local intranet

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

**Survey**

Date Surveyed: Surveyor Name:

**Safety Equipment**

Propeller Hub Locks ☐ Auto Fire Extinguisher ☐ High Water Alarm ☐ Monitoring System ☐

Trailer Ball or Axle Locks ☐ Outboard/Outdrive Locks ☐ Electronic Burglar Alarm ☐ Radar ☐

**Trailer**

Add Trailer

**Boat House**

Add Boat House

Done Local intranet

### Add Trailer:

Clicking the "Add Trailer" button brings up additional fields. (Outlined in red)

**Safety Equipment**

☐ Propeller Hub Locks   
 ☐ Auto Fire Extinguisher   
 ☐ High Water Alarm   
 ☐ Monitoring System  
☐ Trailer Ball or Axle Locks   
☐ Outboard/Outdrive Locks   
☐ Electronic Burglar Alarm   
☐ Radar

---

**Trailer**

Year  \*   
 Manufacturer  \*   
 Value  \*

---

**Boat House**

Enter the Year, Manufacturer Name and Value of the trailer.

### Add Boathouse:

Clicking the “Add Boathouse” button will also bring up additional fields (in green on the following image). Enter the description of the boat house, along with the value and its ZIP code. Click “Delete Boat House” to collapse the fields.

**Boat House**

Description of Boat House  \*   
 Value  \*   
   
 ZIP  \*

Note: Description prints on Endorsement.

---

[Previous Boat](#) | [Next Boat](#)

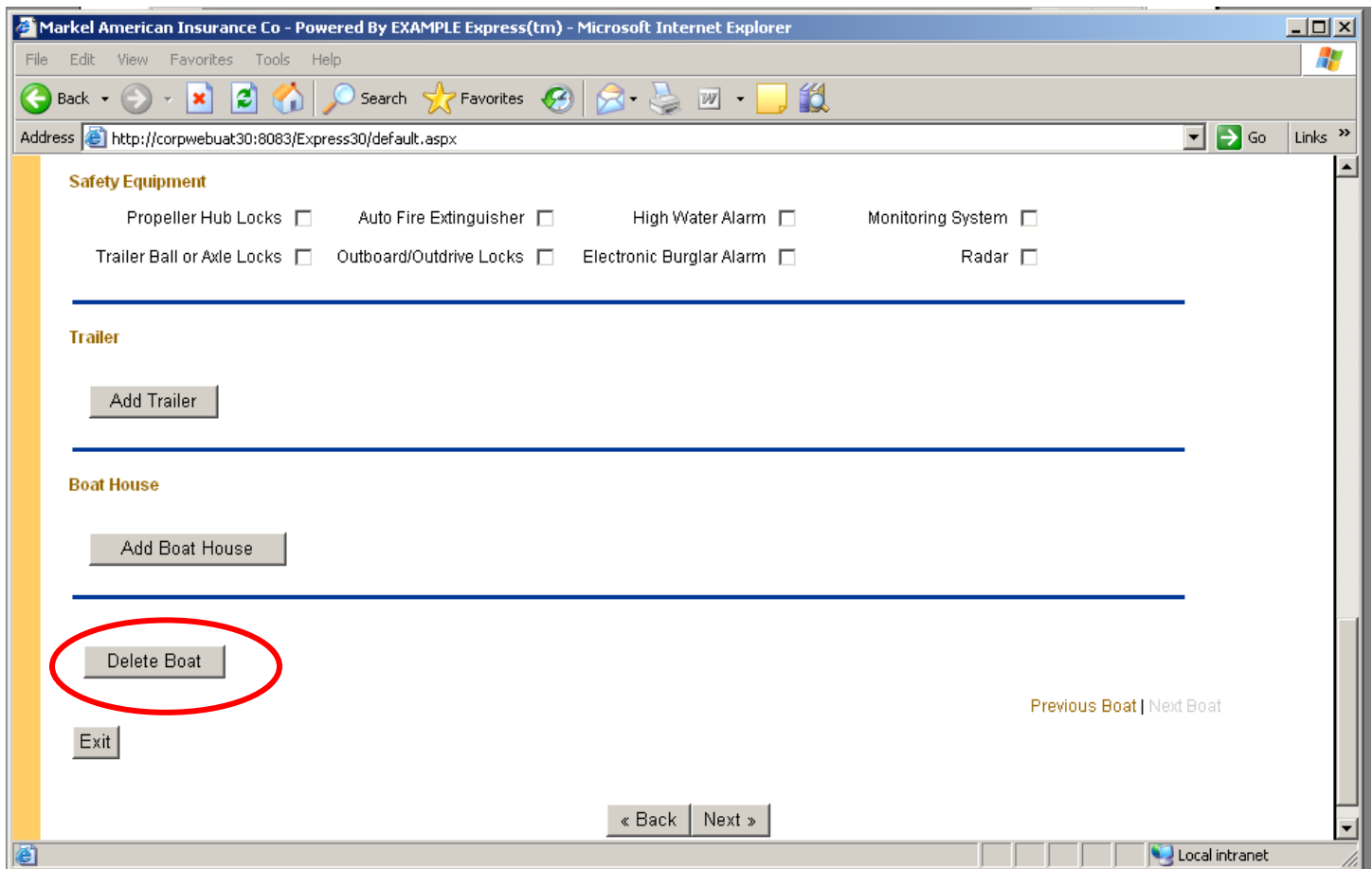
## Add Boat:

If there is more than 1 boat to be quoted, upon completing the boat screen for the first boat, click on “Add Boat” (circled in green below). This will bring up a blank boat screen where the 2<sup>nd</sup> boat’s information should be entered.

The “Add Boat” function can be used an infinite number of times.

If at any time you need to revert to the previous boat’s information, click on “Previous Boat” (as shown below, circled in red).

The screenshot shows a web browser window titled "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://corpwebuat30:8083/Express30/default.aspx". The main content area has a navigation bar with tabs: "Owner Personal", "Boat", "Operator", "Assignment", "Loss Payee Info", and "Coverage". The "Boat" tab is selected. Below the navigation bar, there is a section titled "Boat 2 of 2". In this section, the "Add Boat" button is circled in green, and the "Previous Boat" button is circled in red. The "Add Boat" button is located at the top left of the form, and the "Previous Boat" button is located at the top right. The form itself is titled "Enter Unit Information" and contains several fields: "Year", "Length", "Manufacturer" (a dropdown menu), "Make Not Found" (a checkbox), "Model", "Hull Type", "Hull Material", "Total Weight: Boat & Engine", "Speed", and "Hull ID # (HIN)". There is also a "Speed Calculator" button. Below the "Enter Unit Information" section, there is a section titled "Engine(s)" with fields for "# of Engines", "Drive Type", "Drive Description", "Year", "Engine Manufacturer", "Total Horsepower", and "Type". The status bar at the bottom shows "Done" and "Local intranet".



Clicking “Delete Boat” will delete the current page’s boat information. The delete function is not enabled if there is only one boat listed on the quote.

Once all boat information has been entered click “Next” to proceed to the [Operator Screen](#).

## BOAT SCREEN – MARKEL HELMSMAN YACHT

In lieu of commenting on each field entered on the [Boat Screen – Markel Helmsman Yacht](#), only those fields that require special attention will be noted below. Yellow fields are required to be filled to obtain the quote; blue fields are required to be filled to bind the quote. The two screen shots that follow provide a complete view of the [Boat Screen](#).

**Note:** This section pertains to boats Markel Helmsman Yacht ONLY. For Markel Small Boat or Markel High Performance, refer to their respective sections.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Mail Print W Y Links

Address <http://corpwebuat30:8083/Express30/default.aspx> Go

Owner Personal **Boat** Operator Loss Payee Info Coverage

\* Indicates a required field

Add Boat

Previous Boat | Next Boat

Boat 1 of 1

---

**Enter Unit Information**

Year Length Manufacturer Make Not Found Model

2000 \* \* (select) \* ☐

Yacht Name

Hull Type Hull Material Speed Hull ID # (HIN)

Cruiser/ Express Cruiser \* Fiberglass \* \* \*

Speed Calculator

---

**Engine(s)**

# of Engines 2 Drive Type Inboard/V- Drive \*

Year Engine Manufacturer Total Horsepower Type

\* \* \* Diesel \* Clear

---

**In Season Location**

Location Type Location Name Lay Up Type

(select) \* \* None

Distance from Owner's Residence \* \*

ZIP 54911 \*

Address 1 \*

Address 2

City/County (select) \*

State WI

Done Local intranet

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Print Print Print Print

Address http://corpwebuat30:8083/Express30/default.aspx Go Links >>

Purchase Price  \* Purchase Date  \* Total Value: Hull w/ Engines  \*

---

**Navigation and Usage**

Navigational Territory  \*

Boat Usage  \* Port Risk

---

**Survey**

Date Surveyed  Survey Condition

Surveyor Name  Survey Type

---

**Safety Equipment**

CO Detector ☐ Depth Finder ☐ EPIRB ☐ Fire Suppression ☐

GPS ☐ High Water Alarm ☐ Monitoring System ☐ Radar ☐

VHF ☐ Weatherfax ☐

---

**Trailer**

---

**Boat House**

---

**PWC**

Number Of PWCs

---

**Tender**

Done Local intranet

### Make Not Found:

Upon clicking “Make Not Found”, the manufacturer field will become a field in which you may enter free form text. Please do not use the ampersand sign (&) when entering the manufacturer name. Doing so will cause an error, for example “C & J Marina” should be added as “C and J Marina”

### Speed Calculator:

Clicking “Speed Calculator” will bring up the Speed Calculator window.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx Go Links

# MARKEL AMERICAN INSURANCE COMPANY

MAIC HYBoat WI (00.01) Current Association: Password Batch Change Association Logout

Diary/Attachments

Owner Personal **Boat** Operator Loss Paye

**Rating Messages**  
Boat page - Risk 2000 : to quote you must fill out all required fields indicated in blue.

Add Boat

Boat 1 of 1

**Enter Unit Information**

Year Length Manufacturer  
2000 \* 27 \* \*

Yacht Name

Hull Type Hull Material Speed Hull ID # (HIN)  
\* \* 10 \*

Speed Calculator

**MAIC HYBoat WI (00.01)**

**Speed Calculator**

Enter the values to Calculate the Speed.

Horse Power

Weight (lbs)

Constant

Calculated Speed:

Hull Type	Constant
Heavy V bottom	225
Fast V bottom	250
Catamaran - Pleasure Type	275
Fast Catamaran	300

Return Calculate Speed

Local intranet

Enter the Horse Power, Weight and the appropriate constant listed. Click "Calculate Speed" for an accurate speed estimate. Click return to close the window.

**Enter Unit Information**

Year: 2000 \* Length: 27 \* Manufacturer: (select) \* ☐ Make Not Found Model:

Yacht Name:

Hull Type: Other \* Hull Material: Wood \* Speed: \* Hull ID # (HIN): \*

---

**Engine(s)**

# of Engines: 4 \* Drive Type: Jet \*

Year: \* Engine Manufacturer: \* Total Horsepower: \* Type: Other \*

### Clear:

Pressing the “Clear” button will clear all the fields in the Engine section, as well as set all drop down lists to their default setting.

**Safety Equipment**

CO Detector ☐ Depth Finder ☐ EPIRB ☐ Fire Suppression ☐

GPS ☐ High Water Alarm ☐ Monitoring System ☐ Radar ☐

VHF ☐ Weatherfax ☐

---

**Trailer**

---

**Boat House**

### Add Trailer:

Clicking the “Add Trailer” button brings up additional fields. (Outlined in red below)

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Reload Home Search Favorites Mail Print W Go Links

Address http://corpwebuat30:8083/Express30/default.aspx

**Trailer**

Year \* Manufacturer \* Value \* Delete Trailer

**Boat House**

Add Boat House

Done Local intranet

Enter the Year, Manufacturer Name and Value of the trailer. If you clicked the “Add Trailer” button in error, click on “Delete Trailer” to hide the fields again.

### Add Boathouse:

Clicking the “Add Boathouse” button will also bring up additional fields (in green on the following image). Enter the description of the boat house, along with the value and its ZIP code. Click “Delete Boat House” to collapse the fields.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Reload Home Search Favorites Mail Print W Go Links

Address http://corpwebuat30:8083/Express30/default.aspx

**Boat House**

Description of Boat House Value \* Delete Boat House

ZIP 54911 \*

Note: Description prints on endorsement.

Done Local intranet

### Add PWC Info:

Select the number of PWC's associated with the yacht. Click the “Add PWC Info” button up to four times to add additional information about each PWC.

### Add Tender:

Click the “Add Tender” button to add a description of any tender craft that is associated with the yacht.

The screenshot shows a web browser window titled "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://corpwebuat30:8083/Express30/default.aspx". The page content is divided into two main sections: "PWC" and "Tender".

**PWC Section:**

- Number Of PWCs:
- Add PWC Info button
- Form fields: Year, Manufacturer, Hull ID # (HIN), Value, and ACV (with a dropdown arrow).
- Delete PWC button

**Tender Section:**

- Add Tender button
- Description:
- Delete Tender button

The browser's status bar at the bottom shows "Done" and "Local intranet".

### Add Boat:

If there is more than 1 boat to be quoted, upon completing the boat screen for the first boat, click on “Add Boat” (circled in green). This will bring up a blank boat screen where the 2<sup>nd</sup> boat’s information should be entered.

The “Add Boat” function can be used an infinite number of times. If at any time you need to revert to the previous boat’s information, click on “Previous Boat” (as shown below, circled in red).

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

Owner Personal **Boat** Operator Loss Payee Info Coverage

\* Indicates a required field

**Add Boat**

Boat 2 of 2

**Enter Unit Information**

Year Length Manufacturer Make Not Found Model

1850 \* \* (select) \* ☐

Yacht Name

Hull Type Hull Material Speed Hull ID # (HIN)

Cruiser/ Express Cruiser \* Fiberglass \* \*

Speed Calculator

Local intranet

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

PWC

Number Of PWCs 0

Add PWC Info

Tender

Add Tender

**Delete Boat**

Previous Boat | Next Boat

Exit

« Back Next »

Local intranet

Clicking “Delete Boat” will delete the current page’s boat information. The delete function is not enabled if there is only one boat listed on the quote.

Once all boat information has been entered click “Next” to proceed to the [Operator Screen](#).

## OPERATOR SCREEN

If the first owner entered on the quote is the Primary Operator, click “Yes”. This will populate the Owner information previously captured. If the first owner is not the primary operator, an Additional Operator will need to be added. To add an additional operator, click the “Add Operator” button. This can be done as many times as necessary.

Operators may be deleted by pressing the “Delete” button. However, the delete option is not available if there is only 1 operator listed on the policy.

**Note:** Be aware that screens for Markel High Performance Boats and Markel Helmsman Yachts will differ. Refer to addendums below.

### Motor Vehicle Record:

If an operator has violations on their motor vehicle record, they are to be entered in this field.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://corpwebuat30:8083/Express30/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Diary Save Password Batch Change Association Logout

MAIC SmallBoat VI (01.01) July, 2007 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

**RYAN BENNETT (Quote - New-Pending)**  
QT00000009134

Owner Personal Boat **Operator** Assignment

Add Operator

Previous Operator | Next Operator

Is RYAN BENNETT the Primary Operator? ☒ Yes ☐ No

First Name: RYAN \* Middle Initial: Last Name: BENNETT \* Date Of Birth: 4/4/1984 \* Years of Experience: 5 \*

Has this Operator had any motor vehicle violations or at fault accidents in the last three years? Yes

Has this Operator had any marine losses in the last three years? ☐ No ☒ Yes \*

**Motor Vehicle Violations/At Fault Accidents**

Add Violation

Description	Date (MM/YYYY)	Used In Rating
Speeding 0-9 Over *	11-2007 *	Delete <input checked="" type="checkbox"/>

### Marine Losses:

For each operator, marine loss information is required. If the operator has not had any losses, no further action is required. However, if the answer is “Yes”, the system will require that the losses are entered. (See area outlined in red below.)

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Reload Home Search Favorites Local intranet

Address http://corpwebuat30:8083/Express30/default.aspx Go Links

### Marine Losses

Add Marine Loss

Loss Type	Description	Used In Rating
Storm (Wind/Hail/Snow/Lightning//Flooding)	* HURRICANE	<input type="checkbox"/>
Date 02-2005 * (MM/YYYY)	Amount \$ 2000 *	

Delete

### Operator Experience

Add Experience

# Years	Length	Description of Boat Operated	Speed	Owner?	Operator?
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Previous Operator | Next Operator

Save For Later

< Back Next >

Done Local intranet

Markel High Performance and Markel Helmsman Yacht [Operator Screens](#) will have additional fields.

## Markel High Performance Operator Screen:

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://corpwebuat30:8083/Express30/default.aspx> Go Links »

\* Indicates a required field

Add Operator

Previous Operator | Next Operator

Operator 1 of 1

If the following operator is not the primary operator, please enter the primary operator's information here.

First Name  \* Middle Initial  Last Name  \* Date Of Birth  \* Driver's License #  \* Driver's License State  \*

**Operator Experience**

Operator Experience must be greater than zero.

Add Experience

# Years	Length	Description of Boat Operated	Speed	Owner?	Operator?
<input type="text"/> *	<input type="text"/> *	<input type="text"/> *	<input type="text"/> *	<input type="radio"/> No <input type="radio"/> Yes	<input type="radio"/> No <input type="radio"/> Yes

Has this Operator had any motor vehicle violations or at fault accidents in the last three years? ☐ No ☐ Yes \*

Has this Operator had any marine losses? ☐ No ☐ Yes \*

Occupation:  Safety Courses:

Married: ☒ No ☐ Yes Tres Martin's Performance Boat School ☐

Homeowner: ☒ No ☐ Yes Brian Ross' Learn the Ropes ☐

**Named Operator Assignment**

Named Operator assignment is required for each boat. All operators must be named operators and at least 25 years old. Check all units that apply.

Assigned?	Year	Boat	Speed
<input type="checkbox"/>	2000		0

Done Local intranet

## Markel Helmsman Yacht Operator Screen:

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://corpwebuat30:8083/Express30/default.aspx> Go Links

Add Operator

Previous Operator | Next Operator

Operator 1 of 1

If the following operator is not the primary operator, please enter the primary operator's information here.

First Name  \* Middle Initial  \* Last Name  \* Date Of Birth  \* Licensed Captain ☐

**Operator Experience**

Operator Experience must be greater than zero

Add Experience

# Years	Length	Description of Boat Operated	Speed	Owner?	Operator?
<input type="text"/> *	<input type="text"/> *	<input type="text"/> *	<input type="text"/> *	<input type="radio"/> No <input type="radio"/> Yes	<input type="radio"/> No <input type="radio"/> Yes

Has this Operator had any marine losses? ☐ No ☐ Yes \*

Occupation:

Married: ☒ No ☐ Yes

Homeowner: ☒ No ☐ Yes

Safety Courses:

Previous Operator | Next Operator

Exit

< Back Next >

Done Local intranet

### Occupation and Safety Courses:

These fields (outlined in blue on both screenshots) allow you to enter in additional information pertaining to an operator's occupation, and any additional safety courses taken.

## ASSIGNMENT SCREEN

The screenshot shows a web browser window titled "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "https://maicmgcwebint1:8085/Express21/default.aspx". The page header features the Markel logo and the company name "MARKEL AMERICAN INSURANCE COMPANY". Below the header, there are navigation links: Home, New, Open, Messages, Save, Password, and Logout. The main content area is titled "MAIC SmallBoat MI (00.01) Current Association: AMERICAN UNDERWRITING MGRS AGCY INC". On the left, there is a sidebar with links: Diary/Attachments, Robert Radtke (Quote - New-Pending) QT00000000304, and a tabbed interface with buttons: Owner Personal, Boat, Operator, Assignment (highlighted), and Coverage. The main content area has a section titled "Primary operator assignment for boats 65 mph and less" and another titled "Operator assignment for boats over 65 mph (Select all operators that apply)". Below the second section, there is a table with two columns: Operator Name and Vessel. The first row shows "Robert Radtke" and "2006 ELIMINATOR BOATS 22". The "2006 ELIMINATOR BOATS 22" cell is highlighted with a red box. Below the table, there is a "Save For Later" button and "Back" and "Next" buttons.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Reload Home Search Favorites Local intranet

Address https://maicmgcwebint1:8085/Express21/default.aspx Go Links

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Messages Save Password Logout

MAIC SmallBoat MI (00.01) Current Association: AMERICAN UNDERWRITING MGRS AGCY INC

Diary/Attachments

Robert Radtke (Quote - New-Pending)  
QT00000000304

Owner Personal Boat Operator **Assignment** Coverage

Primary operator assignment for boats 65 mph and less

Operator assignment for boats over 65 mph (Select all operators that apply)

Robert Radtke 43 - 11/19/1963	<input checked="" type="checkbox"/> 2006 ELIMINATOR BOATS 22
----------------------------------	--

Save For Later

« Back Next »

Done Local intranet

To assign an operator--click on the box that correlates the operator to the specific vessel that they intend to operate. (See area outlined in red above.) Doing the latter will make that operator a named operator for that particular vessel and the operator's name will then print on the declarations page for that vessel.

## LOSS PAYEE INFO (MARKEL HIGH PERFORMANCE/MARKEL HELMSMAN YACHT ONLY)

Markel High Performance boats, as well as Markel Helmsman Yachts may require the agent to add a Loss Payee if applicable. To enter, Click on the “Add Loss Payee” button.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Diary Save Password Batch Change Association Logout

MAIC HPBoat WI (00.01) Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

R B (Quote - New-Pending)  
QT00000009133 - HPBoat  
AMERICAN UNDERWRITING MGRS - AMERICAN UNDERWRITING MGRS

Owner Personal Boat Operator Assignment **Loss Payee Info** Coverage

2000 Challenger Offshore Add Loss Payee

1999 Activator Add Loss Payee

Exit

Note: Risk must have watercraft and equipment coverage in order to add Loss Payee.

« Back Next »

Done Local intranet

This will bring up fields for entering in the Payee’s information. All fields in blue must be filled out to bind the quote. Validate Address works the same as on the [Owner Screen](#).

If the Loss Payee is the same for multiple boats, use the copy and paste button to enter the information more quickly.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

Owner Personal Boat Operator Assignment **Loss Payee Info** Coverage

\* Indicates a required field

2000 Challenger Offshore

Name  \*

ZIP  \*

Address 1  \*

Address 2

City/County (select) \*

State

Delete Validate Address

Copy Paste

1999 Activator Add Loss Payee

Exit

Note: Risk must have watercraft and equipment coverage in order to add Loss Payee.

« Back Next »

Local intranet

## COVERAGE SCREEN

Upon completion of the required quote information, the **Coverage Screen** will appear. The **Coverage Screen** displays the following:

### Annual Premium:

The total unit premium, not including any taxes.

### Unit Fees/Taxes:

Any taxes/fees that apply to the unit.

### Policy Taxes/Fees:

Any applicable taxes/fees on the policy.

### Total Annual Premium:

The total premium plus any applicable taxes.

### Coverages Table:

Lists all applicable coverages for the unit, along with the limit, deductible and premium.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

Home New Open Diary Save Password Batch Change Association Logout

MAIC SmallBoat OR (01.01) July, 2007 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

JOSH FOSTER (Quote - New-Pending)  
QT00000008354

Owner Personal Boat Operator Assignment Coverage Submission

Quote is NOT legal until policy has been bound

Financial Responsibility Level I

Annual Premium:	Unit Fees/Taxes:	Policy Fees/Taxes:	Total Annual Premium:
\$772.00	\$0.00	\$0.00	\$772.00

Rate Print View Payment Schedules Save For Later

Prev Page | Next Page

2007 CENTURION ESCALADE

Coverages:	Limit	Deductible	Premium
Watercraft & Equipment	42000	1% * \$420	\$597
No Coverage desired	<input type="checkbox"/>		
Settlement Type	Agreed Value		
Watercraft Liability	\$300,000 *		\$135
No Liability desired	<input type="checkbox"/>		
Uninsured Boater	\$300,000		incl.
Medical Payments	\$1,000		incl.
Pollution	\$500,000		incl.
Personal Effects	\$1,000	\$250	incl.

Local intranet

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://corpwebuat30:8083/Express30/default.aspx> Go Links >>

Towing	\$500	incl.	
Trailer	\$4,000	\$250	\$40
Fishing	(select)		\$0
Boat Lift	(select)		\$0
Boating Experience (+/- 5%)	0		
Unit Premium			\$772
Rated Operator	JOSH FOSTER		

**Endorsements:**

Diminishing Deductible

(Select) Add

Prev Page | Next Page

Annual Premium:	Unit Fees/Taxes:	Policy Fees/Taxes:	Total Annual Premium:
\$772.00	\$0.00	\$0.00	\$772.00

Rate Print View Payment Schedules Save For Later

< Back Next >

Done Local intranet

When Boat Lift Coverage is added to the policy, the Boat Lift Coverage Endorsement will appear in the endorsement box on the [Coverage screen](#).

### Unit Premium:

The total premium for all of the coverages (not including any applicable taxes)

### Endorsements for Markel Small Boat:

All mandatory endorsements will apply to the quote automatically and will be in a “read only” format. Various endorsements are available to add to the policy manually.

To add an endorsement, click on the drop down list and select the endorsement that you wish to add. Then click the “Add” button.

Once an optional endorsement is added, a “Delete” button will appear, so the endorsement can be deleted at a later date as well. In the screen print that follows, the Double Deductible Endorsement was added, notice the “Delete” button to the right of the endorsement.

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://maimagicdct:8080/Express21/default.aspx

No Liability desired ☐

Uninsured Boater \$500,000 incl.

Medical Payments \$1,000 incl.

Pollution \$500,000 incl.

Personal Effects \$1,000 \$250 incl.

Towing \$500 incl.

Trailer (select) \$0

Fishing (select) \$0

Boat Lift (select) \$0

Unit Premium \$646

Rated Operator Lisa Testing

**Endorsements:**

Actual Cash Value

Diminishing Deductible

Double Deductible For Theft

(Select)

Prev Page | Next Page

<b>Annual Premium:</b>	<b>Unit Fees/Taxes:</b>	<b>Policy Fees/Taxes:</b>	<b>Total Annual Premium:</b>
\$646.00	\$0.00	\$0.00	\$646.00

Done Local intranet

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Diary Save Password Batch Change Association Logout

MAIC HYBoat WI (00.01) Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

TEST TEST (Quote - New Pending)  
QT00000008982 - HYBoat  
AMERICAN UNDERWRITING MGRS - AMERICAN UNDERWRITING MGRS

Owner Personal Boat Operator Loss Payee Info Coverage Submission

\* Indicates a required field

Financial Responsibility Level Z

The owner information entered resulted in a NO HIT. Please verify the information and correct if necessary.

<b>Annual Premium:</b>	<b>Unit Fees/Taxes:</b>	<b>Policy Fees/Taxes:</b>	<b>Total Annual Premium:</b>
\$862.00	\$0.00	\$0.00	\$862.00

Prev Page | Next Page

2006 FORMULA

Coverages:

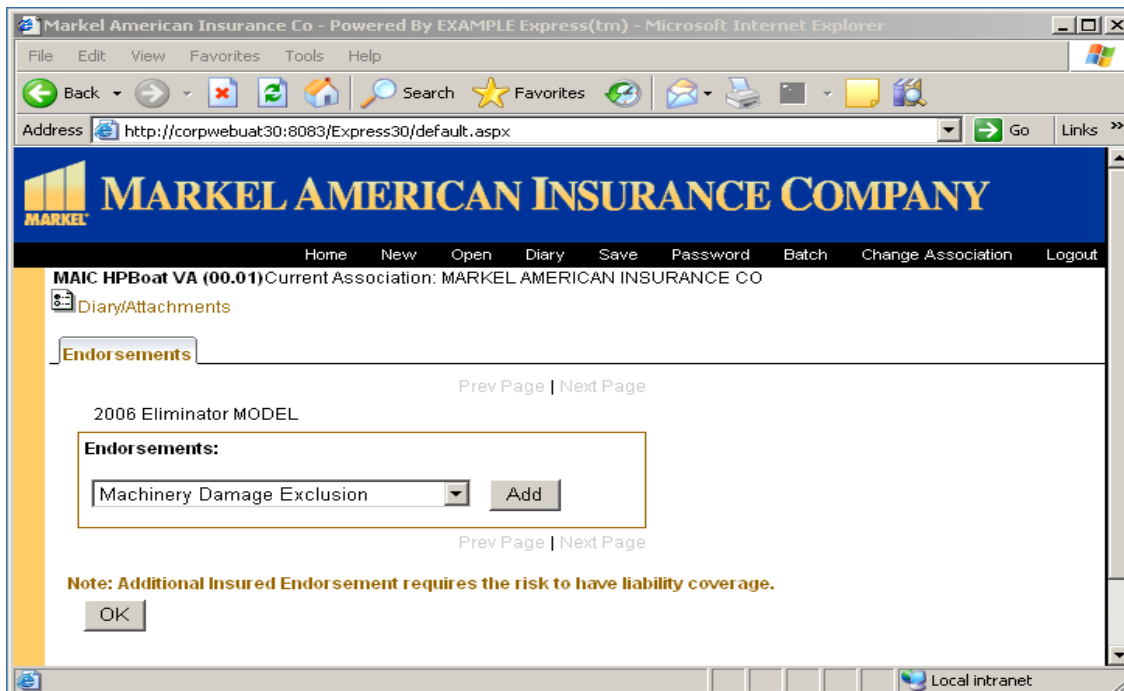
	Limit	% Ded	\$ Ded	Premium
No Hull Coverage	<input type="checkbox"/>			
Hull	\$150000	2%	\$3,000	\$669
PWC Hull ACV			N/A	\$0

Settlement Type

Done Local intranet

### Endorsements Button – Markel High Performance and Markel Helmsman Yacht:

Both Markel High Performance and Markel Helmsman Yacht Coverage Screens contain the Endorsements Button. Clicking on the Endorsements Button brings up the Endorsements Screen. (See screenshot below)



Depending on the type of endorsement selected, additional information may be required to be entered. In order to complete an endorsement, click the Add button after filling out any asterisked fields (if necessary.)

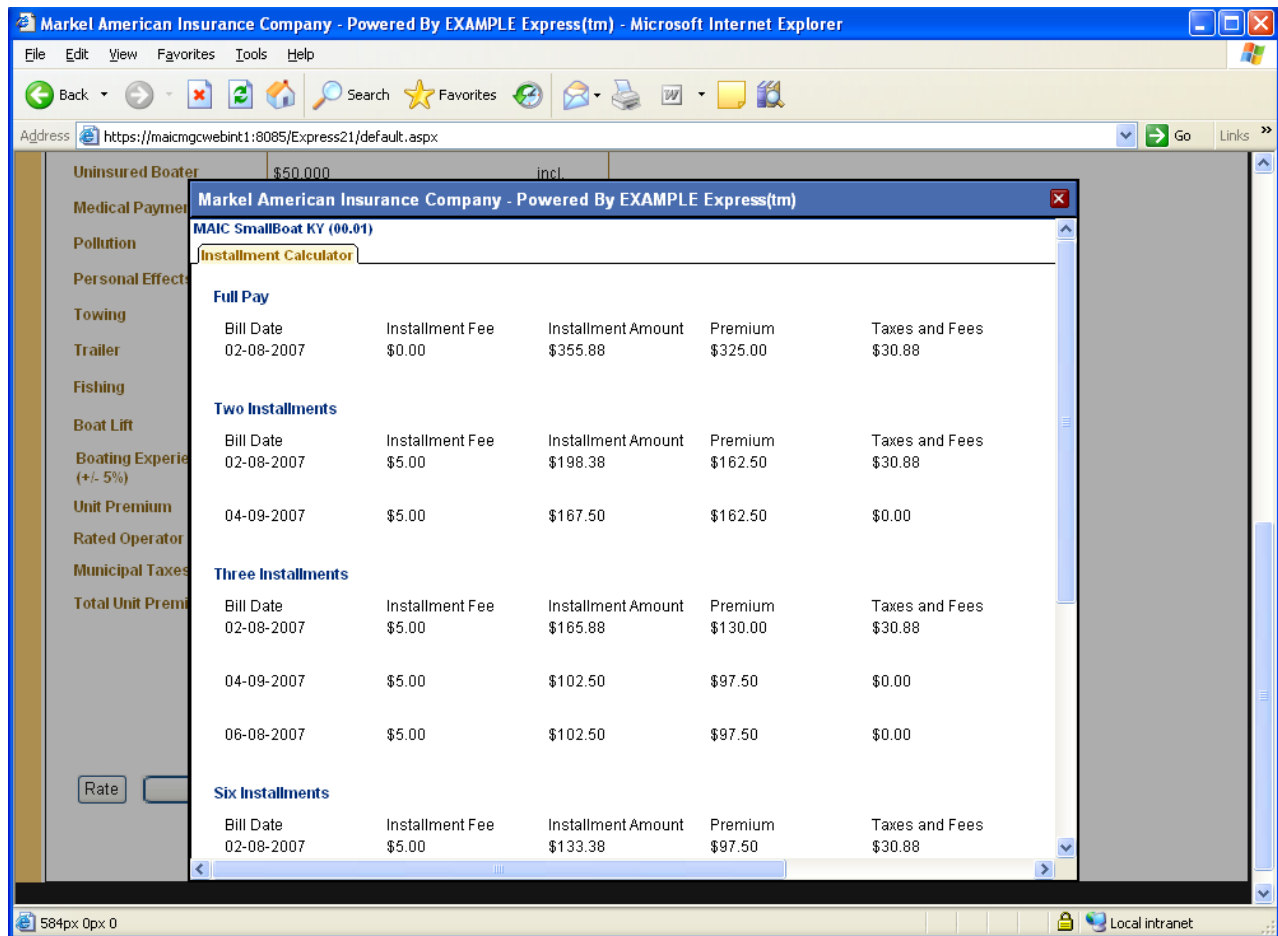
### Rate:

There is a “Rate” button at the top and the bottom of the [Coverage Screen](#).

Click the “Rate” button to rate the coverages you have selected. We recommend getting in the habit of clicking “Rate” prior to clicking “Print” to generate the quote sheet.

### View Payment Schedules:

This will allow you to look at the available payment plans based on the premium quoted. The [Installment Calculator Screen](#) will display. Clicking “OK” will take you back to the [Coverage Screen](#).



### Print:

Clicking "Print" will prepare the quote sheet (and an application, if applicable) as a PDF file that can be printed and emailed. The quote sheet will contain all of the pertinent notices and disclosures. The PDF becomes part of the quote.

Upon clicking print, a box will appear that allows you to enter notes that will print on the quote sheet. If you wish to enter notes, do so, and then click "Print".

**Note:** It is advisable to always use the print feature to print a quote, in lieu of just printing the page from your web browser. The PDF file that is generated contains important notices and disclosures that need to be shared with the applicant.

Once all Coverages and Limits have been chosen, you can either Exit the quote by clicking "Save for Later" or click "Next". Clicking "Next" will take you to the [Submission Screen](#).

## JUDGMENTS SCREEN (MARKEL HIGH PERFORMANCE/MARKEL HELMSMAN YACHT)

### Judgments:

Clicking on the “Judgments” button (circled in red below) in the [Coverages Screen](#) will bring you to the [Judgment Screen](#).

The screenshot shows a web browser window titled "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://corpwebuat30:8083/Express30/default.aspx". The main content area displays a table of coverages and a "Judgments" button circled in red.

Coverage	Amount	Rate	Amount	Amount
Boat Lift	<input type="text" value="0"/>		\$0	\$0
Trailer	\$0	2%	\$0	\$0
Boat House	\$0	2%	\$0	\$0
Endorsement Premium				\$0
Unit Premium				\$6,500
Rated Operator	DOROTHY GOODWIN			

**Judgments**

**Optional Endorsements**

Total Loss Valuation

**Trip**

\$0

Hull rate per \$100: \$4.040

Prev Page | Next Page

Annual Premium:	Unit Fees/Taxes:	Policy Fees/Taxes:	Total Annual Premium:
\$6,500.00	\$0.00	\$0.00	\$6,500.00

Endorsements Rate View Payment Schedules Exit

« Back Next »

## Markel High Performance Judgment Screen:

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://corpwebuat30:8083/Express30/default.aspx

**MAIC HPBoat VA (00.01)**

**Judgment**

	W & E	Liability	Comments
Navigation	<input type="text"/> %	<input type="text"/> %	<input type="text"/>
Owner/Operator	<input type="text"/> %	<input type="text"/> %	<input type="text"/>
Boat Characteristics	<input type="text"/> %	<input type="text"/> %	<input type="text"/>
Other - Explain below	<input type="text"/> %	<input type="text"/> %	<input type="text"/>
Total	0 %	0 %	

% Commission Reduction (Applies to all units on this policy.)

Comments:

Cancel OK

Watercraft Liability \* \$2,020

Fill in the fields with the appropriate values. If a value is entered into a W & E or Liability Field, it will be mandatory for the user to enter a comment. Click OK when finished. Any judgments entered will cause the quote to be referred.

## Markel Helmsman Yacht Judgment Screen:

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: <http://corpwebuat30:8083/Express30/default.aspx>

**MAIC HYBoat WI (00.01)**

**Judgment**

	HULL		P&I		Comments
Navigation	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>
Owner/Operator	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>
Yacht Characteristics	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>
Other - Explain below	<input type="text"/>	%	<input type="text"/>	%	<input type="text"/>
<b>Total</b>	0	%	0	%	

% Commission Reduction (Applies to all units on this policy.)

Comments:

Cancel OK

Fill in the fields with the appropriate values. If a value is entered into a HULL or P&I field, it will be mandatory for the user to enter a comment. Click OK when finished. Any judgments entered will cause the quote to be referred.

## SUBMISSION

Once on the [Submission Screen](#), you can Exit (which saves the quote for later), Complete the Quote, Refer it, Move Agency or go back to make any desired changes.

### Billing Instructions

Select the appropriate value from the drop down menu. Choices are “Bill Insured” or “Bill Other.” If the bill is to go to someone other than the insured, select “Bill Other.”

### Exit:

If the quote is done being processed and no further action is required at that time, click “Exit”. The quote can then be retrieved to work on again at a different time.

### Move Agency:

If you accidentally chose the incorrect sub-producer when starting your quote, you will be able to reassign to the correct sub-producer by using the Move Agency button. This option will also be available on the last screen in the complete issuance process. This button is only available for agents or internal users.

### Refer:

If the quote is processed but requires approval for some reason, click the “Refer” button.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: <http://corpwebuat30:8083/Express30/default.aspx>

RYAN BENNETT (Quote - New-Pending)  
QT00000009175 - HPBoat  
AMERICAN UNDERWRITING MGRS - AMERICAN UNDERWRITING MGRS

Owner Personal | Boat | Operator | Assignment | Loss Payee Info | Coverage | **Submission**

Name: RYAN BENNETT  
Previous Policy Number: N/A

**Premiums**

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$1,652.00	\$1,652.00	\$0.00	\$1,652.00

**Billing Instructions**  
Bill Insured

**Billing Information**

Name	RYAN BENNETT
ZIP	54901-4757
Address 1	512 ALGOMA BLVD APT 302
Address 2	
City/County	Oshkosh/Winnepago
State	WI

**Available Actions**

Print | **Refer** | Move Agency | Complete Quote | Exit

< Back

Local intranet

**Note:** The “Refer” button will always display, even when a referral is not required. Please pay attention to the rating messages to confirm whether a referral is required or not.

You may also refer at any time that you would simply like a second opinion on a risk.

*For more information on referrals  
see the section that follows re Referring a Risk for Approval.*

## Complete Quote:

If you would like to Issue the quote or Complete the remaining information, click the “Complete Quote” button. On the Markel High Performance and Markel Helmsman Yacht screens, if information is missing, the tabs that require additional information will turn red and the missing data will be communicated through messages on top of the screen. (See screenshot below) To continue issuing the quote, go back to the tabs in red and fill in the missing information.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Print Mail Print Mail

Address http://corpwebuat30:8083/Express30/default.aspx Go Links

Owner Personal **Operator** Assignment Loss Payee Info Coverage

\* Indicates a required field

**Rating Messages**

Operator page - Operator RYAN BENNETT: To quote you must fill out all required fields indicated in yellow; to issue you must fill out all required fields indicated in blue.  
Boat page - Risk 2000 Adrenaline : to quote you must fill out all required fields indicated in yellow; to issue you must fill out all required fields indicated in blue.  
Policy Effective Date cannot be prior to 2/9/2008 12:00:00 AM or later than 4/14/2008 12:00:00 AM

Name: RYAN BENNETT  
Previous Policy Number: N/A  
Effective Date:  \*

**Premiums**

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$0.00	\$1,652.00	\$0.00	\$1,652.00

**Billing Instructions**

Bill Insured

**Billing Information**

Name RYAN BENNETT  
ZIP 54901-4757  
Address 1 512 ALGOMA BLVD APT 302  
Address 2  
City/County Oshkosh/Winnebago  
State WI

**Available Actions**

Print Move Agency Exit

« Back

Local intranet

## Markel Small Boat Screen:

Diary/Attachments

JOY RIDER (Quote - New-Pending)  
QT00000009634

Owner Personal Boat Operator Assignment Coverage **Issue Operator Info** Risk Location Additional Interest Info

\* Indicates a required field

**Mailing Address Confirmation**

**Mailing Address**

Owner Name JOY RIDER

Mailing ZIP 61108 \*

Mailing Address 1 1 MARINA WAY \*

Mailing Address 2

City/County Rockford/Winnebago \*

Mailing State IL

E-Mail Address

Primary Phone 262-548-9880 \*

Secondary Phone

Fax #

**Driver's License Information**

Operator Name	Drivers License Number	License State
JOY RIDER	*	(select) *

Save For Later

< Back Next >

Upon clicking "Complete Quote" for a Markel Small Boat with no missing information, three new Tabs will appear: [Issue Operator Info Screen](#), [Risk Location Screen](#) and the [Additional Interest Info Screen](#).

## ISSUE OPERATOR INFO – MARKEL SMALL BOAT ONLY

On the [Issue Operator Info Screen](#), you will verify the mailing address information as well as complete the driver's license information for all operators.

### Owner name:

This will auto populate from the [Owner Personal Screen](#).

### Mailing Address/City and Zip code:

This information will also auto populate from the [Owner Personal Screen](#).

### Primary Phone:

The phone number including the area code must be entered.

### Operator name:

This will auto populate from the [Assignment Screen](#). If there is more than one operator, all of the names will automatically populate.

### Drivers License Number/License State:

These are mandatory fields and must be entered (for each operator listed).

MAIC SmallBoat IL (01.01) July,2007 Current Association: MARKEL AMERICAN INSURANCE CO

[Diary/Attachments](#)

JOY RIDER (Quote - New-Pending)  
QT00000009634

Owner Personal Boat Operator Assignment Coverage Issue Operator Info Risk Location Additional Interest Info Submission

\* Indicates a required field

#### Mailing Address Confirmation

##### Mailing Address

Owner Name JOY RIDER

Mailing ZIP 61108 \*

Mailing Address 1 1 MARINA WAY \*

Mailing Address 2

City/County Rockford/Winnebago \*

Mailing State IL

E-Mail Address

Primary Phone 262-548-9880 \*

Secondary Phone

Fax #

#### Driver's License Information

Operator Name Drivers License Number License State

JOY RIDER DRIVERS LICENSE \* MS \*

Save For Later

« Back Next »

The “Next” button will take you to the [Risk Location Screen](#).

## RISK LOCATION – MARKEL SMALL BOAT ONLY

On the [Risk Location Screen](#) you will enter the additional required information regarding the boat, motor, trailer if applicable), and the location of the vessel.

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://maimagicdct:8080/Express21/default.aspx

Home New Open Messages Save Password Batch Logout

MAIC SmallBoat AL (01.01) Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

test quote (Quote - New-Pending)  
QT00000005298

Owner Personal Boat Operator Assignment Coverage Issue Operator Info Risk Location Additional Interest Info Submission

\* indicates a required field.

Select Risk: 2007 BAYLINER

Unit Information

Hull Serial # hullserial number \*

Engine 1 Serial #

Risk Location

Is this Boat kept at the same location Out Of Season? ☒ Yes ☐ No \*

In Season

Zip Code 35201

Address 1 123 Test Rd \*

Address 2

City/County Birmingham/Jefferson

State: AL

Facility Type Residence \*

Facility Name

Save For Later

« Back Next »

Done Local intranet

### Select Risk:

The Unit description will auto populate in the drop-down box from the [Boat Screen](#). If there is more than one unit, after entry of unit 1 information, the user must select any additional units from the drop down box and enter the information for the additional unit(s).

### Unit Information:

The required unit information includes the Hull ID number, engine serial number(s) depending on the type of propulsion, and trailer information if trailer coverage was selected.

### Trailer Information:

If trailer coverage is selected on the [Coverage Screen](#), the [Risk Location Screen](#) will have fields to capture the trailer manufacturer, model and serial number. See screen shot below.

Market American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://maimagicdct:8080/Express21/default.aspx

stena nansen (quote - New Renewal) QT00000000069

Owner Personal Boat Operator Assignment Coverage Issue Operator Info **Risk Location** Additional Interest Info

Save For Later

\* indicates a required field.

**Must enter a Hull Serial Number for every boat**

**Must enter Information for every boat.**

Select Risk: 2004 AQUASPORT 120

**Unit Information**

Hull Serial # \*

Engine 1 Serial # \*

**Trailer Information**

Make Year Serial Number \*

\*\*\* Warning - Trailer coverage is limited to \$500 without a serial number. \*\*\*

\*\*\* Please enter the serial number or click "Reset Coverage" button to change Trailer Coverage Limit. \*\*\*

Reset Coverage

**Risk Location**

Is this Boat kept at the same location Out Of Season? ☒ Yes ☐ No \*

**In Season**

Zip Code 33037

Done Local intranet

## Risk Location:

If the unit is kept at the same location out of season, select "Yes". The city, state, and zip code will auto populate from the location section on the boat screen. You will be required to enter the Address where it is kept in the **Address 1 field**.

If the boat is not kept in the same location out of season, select "No". If you select "No", an additional set of fields will appear for you to enter the "Out of Season" location.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Mail Print W Y Links

Address https://maicmgcwebint1:8085/Express21/default.aspx Go

Diary/Attachments

Robert Radtke (Quote - New-Pending)  
QT00000000304

Owner Personal Boat Operator Assignment Coverage Issue Operator Info **Risk Location** Additional Interest Info

\* indicates a required field.

**Must enter information for every boat.**

Select Risk: 2006 ELIMINATOR BOATS 22

**Unit Information**

Hull Serial # ELB5555E206 \*

Engine 1 Serial # OG123456 \*

**Risk Location**

Is this Boat kept at the same location Out Of Season? ☐ Yes ☒ No \*

In Season		Out of Season	
Zip Code	49935	Zip Code	49915 *
Address 1	434 W. Hagerman Lake Road *	Address1	16 E. 1st St. *
Address 2		Address 2	
City/County	Iron River/Iron	City/County	Caspian/Iron *
State:	MI	State	MI
Facility Type	Residence *	Facility Type	Place Of Business *
Facility Name		Facility Name	

Save For Later

« Back Next »

Done Local intranet

### Facility Type:

Select from the drop down box what type of facility the unit is kept. This field is mandatory.

The “Next” Button will take you to the [Additional Interest Screen](#).

## ADDITIONAL INTEREST INFO – MARKEL SMALL BOAT ONLY

1. If you need to add a Lienholder and/or an Additional Interest, select the unit from the drop down box that you are adding a Lienholder/Additional Interest to.

**Note:** Lienholder fields do not display until the policy is in the complete issuance phase for Markel Small Boat.

The screenshot shows a web browser window titled "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://corpwebuat30:8083/Express30/default.aspx". The page header includes the Markel logo and the company name "MARKEL AMERICAN INSURANCE COMPANY". Below the header is a navigation bar with links: Home, New, Open, Diary, Save, Password, Batch, Change Association, and Logout. The main content area displays "MAIC SmallBoat MI (00.02) Current Association: MARKEL AMERICAN INSURANCE CO". There is a "Diary/Attachments" link and a "CAROL PREMO (Quote - New-Approved)" section with the ID "QT00000003919". A tabbed interface shows several tabs: Owner Personal, Boat, Operator, Assignment, Coverage, Issue Operator Info, Risk Location, and Additional Interest Info. The "Additional Interest Info" tab is active, showing a "Select Risk:" dropdown menu with the selected value "1990 SKI SUPREME/GENMAR IND Ski Supreme". Below this are three buttons: "Add Additional Insured", "Add Lienholder", and "Save For Later". A "Back" button is located at the bottom of the form area.

2. Select "Add Additional Insured" or "Add Lienholder" depending on which one you are adding. This will change the screen as shown below:
3. Enter the name and address of the Additional Interest or the Lienholder and click the "Next" button. If there is more than 1 unit on the quote, you must select that unit from the drop down box and repeat the last step.

If the Lienholder or Additional Interest happens to be the same for one or more units, you may use the Copy/Paste function. Enter in the applicable information, and then click "Copy". Select the next unit that the entity needs to be added to and click "Paste". All of the appropriate information will copy over. This may be done as many times as necessary.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://corpwebuat30:8083/Express30/default.aspx> Go Links

Owner Personal Boat Operator Assignment Coverage Issue Operator Info Risk Location **Additional Interest Info**

\* Indicates a required field

**Additional Interest Information**

Select Risk: 1990 SKI SUPREME/GENMAR IND Ski Supreme

Add Lienholder

Type	Additional Insured
Name	<input type="text"/> *
Zip Code	<input type="text"/> *
Address 1	<input type="text"/> *
Address 2	<input type="text"/>
City/County	(select) *
State	

Copy Paste

Delete

Save For Later

« Back

Done Local intranet

If there is no Lienholder or Additional Interest, you may click the next button to proceed to the [Submission Screen](#) to finish the issuing process.

## SUBMISSION—Refer, Apply Payment & Issue

Once the final 3 screens have been completed, the [Submission Screen](#) is your final stop.

The action you are able to take at this time is based on your authority as well as if the risk is approved for issuance.

If you have received a rating message that advises that the risk must be referred, at this time you will refer the policy by clicking the “Refer” button or click “Exit”. (See instructions that follow regarding referrals)

If the Policy is ready to issue, click the “Complete Issuance” button shown below. The system will force you to enter an Effective Date.

The effective date of the policy cannot be less than 5 days or more than 60 days from today’s date.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Reload Home Search Favorites Print Mail

Address <http://corpwebuat30:8063/Express30/default.aspx> Go Links >>

Owner Personal Boat Operator Loss Payee Info Coverage **Submission**

\* Indicates a required field

Name: RYAN BENNETT  
Previous Policy Number: N/A  
Effective Date: 2/14/2008 \*

**Premiums**

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$951.00	\$951.00	\$0.00	\$951.00

**Issue Notes**

Remarks

Available Actions

Print Refer Move Agency **Complete Issuance** Exit

< Back

Done Local intranet

### Complete Issuance:

Clicking the “Complete Issuance” button will load the Payment Information. A Payment box will appear as shown below.

**Note:** If any blue fields have not been filled out for a Markel High Performance or Markel Helmsman Yacht, the agent will be required to go back and enter in the missing information.

The screenshot shows a web browser window with the address <http://corpwebuat30:8083/Express30/default.aspx>. The main content area is titled "MAIC HYBoat VI (00.01)" and contains a "Payment Information" section. This section includes a "Policy Information" table with the following data:

Full Annual Premium	Policy Term	Coverage Start Date
\$951.00	12 Months	2/14/2008 (mm/dd/yyyy)

Below the table, there is a "Payment" section with the following fields:

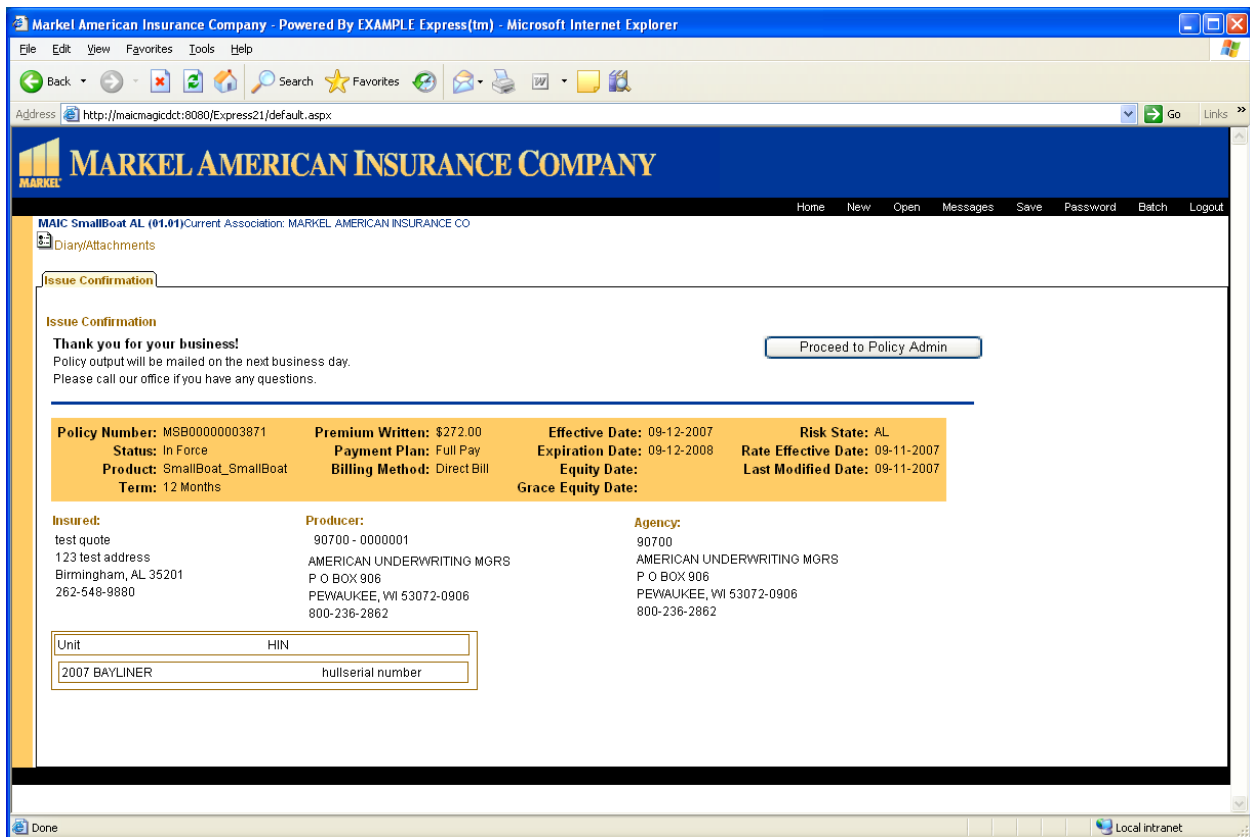
- Payment Plan: (Select) \*
- Payment Type: (select) \*
- Amount: \* \$0.00
- Minimum Payment Amount: \$0.00

There are "View Payment Schedules" and "Cancel" buttons. The sidebar on the left contains links for "Owner Personal", "Diary/Attachments", "Name: RYAN BENN", "Previous Policy Num", "Effective Date: 2/14", "Premiums", "Total Annual Premium: \$951.00", "Issue Notes", and "Remarks". The bottom of the page has "Available Actions" including "Print", "Refer", "Move Agency", "Complete Issuance", and "Exit".

## Payment Information:

At the top of the payment box, the total policy premium is displayed as well as the policy term.

1. Click on "View Payment Schedules" to view what installment plans are available based on that premium amount.
2. Pick the chosen payment plan from the drop down box.
3. Choose the Payment Type. Depending on the user authority and the risk, not all payment types may be available. (See below for Credit Card Payments.)
4. Enter the Payment amount, if applicable. The system will advise what the minimum payment amount is.
5. For check or money orders, you will be required to enter the reference number (see Accounting Procedure section that follows).
6. Once the above has been entered, click "Complete Issuance" to finish issuing the policy or "Cancel" to discontinue issuing the policy.
7. An [Issue Confirmation Screen](#) will appear advising that the policy has been issued and that output will be mailed out the next business day. (see below) The assigned policy number will be visible in the upper left-hand corner of the orange summary box.



8. Also, as soon as output is available, it may be printed in your office.
9. At this point, you may exit the policy by starting a new transaction, or proceed to Policy Administration.

*For Accounting / Check Deposits / etc.*

*please see the Accounting Procedures section towards the end of the manual.*

## Paying by Credit Card:

1. Select Credit Card as the Payment type.
2. The screen will change appearance as shown in red below.
3. If the cardholder is the same as the insured, click 'Yes'. The fields will populate with the applicant's mailing address information.

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://maimagicdct:8080/Express21/default.aspx

MAIC SmallBoat KY (00)

Diary/Attachments

Owner Personal Boat

Rating Messages

- This context is not
- This context is not
- This context is not
- This context is not

Name: Holy Macker

Premiums

Total Annual Premium: \$439.43

Issue Notes

Remarks

Available Actions

Refer

Payment

\$439.43 12 Months 02-21-2007 (mm/dd/yyyy) View Payment Schedules

Payment Plan: Three Installments

Payment Type: Credit Card

Amount: 201.43 Minimum Payment Amount: \$201.43

Is Cardholder same as Insured? ☐ Yes ☒ No

Cardholder Information

Name: \*

Address: \*

City: \* Zip Code: \* State: (select) \*

Credit Card Information

Credit Card Type: --Select a Credit Card-- \* Credit Card #: \* Security Code: \*

Expiration Date: (Select) \* / \* (mm/yyyy)

When you click on the Submit Payment button, credit card payment will be processed.  
Do not click on the button more than once or you risk the credit card being charged multiple times.  
Please wait for the confirmation page which will display when the policy has been issued.

Association Logout

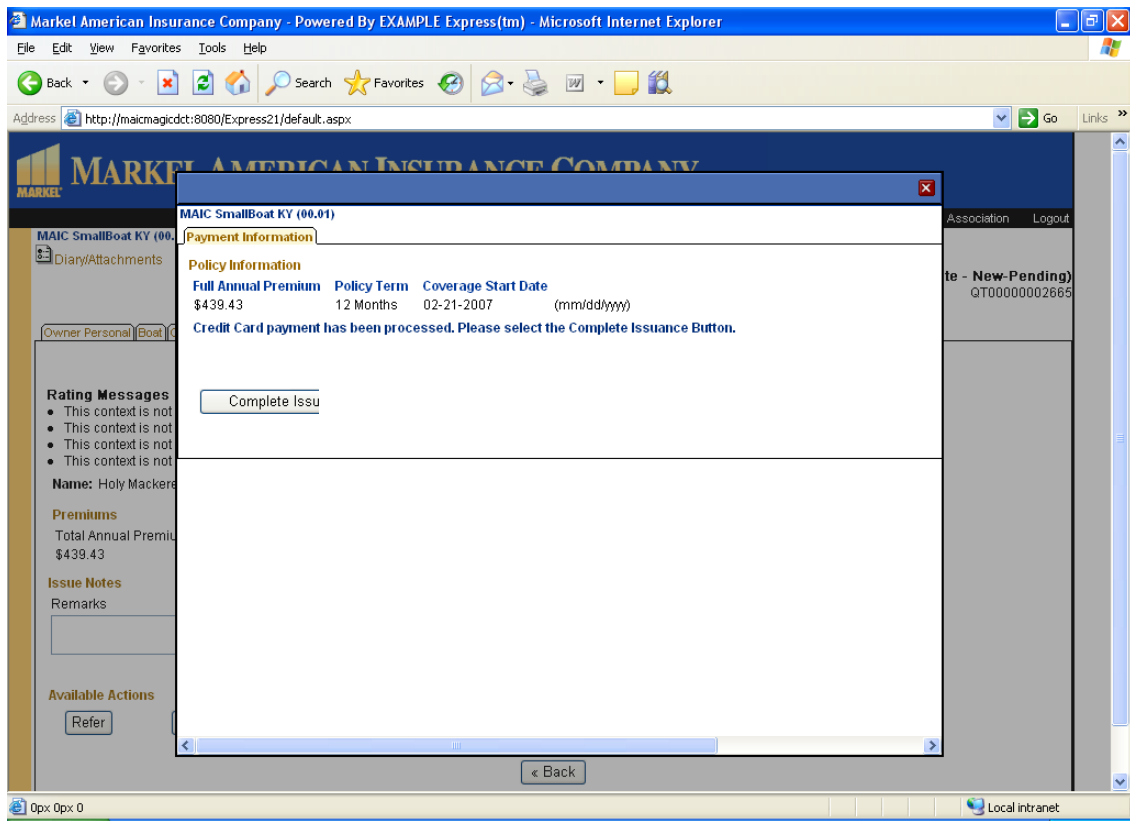
te - New-Pending) QT00000002665

Local intranet

4. If the cardholder is not the same as the insured, click 'No' and enter in all required information.
5. Complete the Credit Card Information section.
6. Once complete, click "Submit Payment".

**NOTE:** **Do not click on the button more than once or you risk the credit card being charged multiple times.**

7. Please wait for the confirmation page (as shown below).



8. Click “Complete Issuance”.

## REFERRING FOR APPROVAL

Any time a quote or other transaction is outside a user's authority, it must be referred for approval. For efficiency, referral submissions should be made via the MAGIC system messaging capability.

If the risk is outside of your authority a quote indication will be provided. The system will alert you that approval is required. Quotes may be released as an indication without being submitted to the company. When releasing an indication to an applicant, please be sure to notify them that coverage and premium is subject to company review and approval.

Any risk requiring referral will follow an established hierarchy. For instance, a risk entered by a sub-producer will be referred to the General Agent. If the General Agent does not have the authority to approve the risk, the General Agent will refer the risk to MAIC. Once approved, the risk will follow the chain back down to the sub-producer.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://corpwebuat30:8083/Express30/default.aspx> Go Links >>

**MAIC HYBoat WI (00.01)** Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

**RYAN BENNETT (Quote - New-Pending)**  
QT00000009075 - HYBoat  
AMERICAN MARINE INS SERVICES - AMERICAN MARINE INS. SERVICES

Owner Personal Boat Operator Loss Payee Info Coverage **Submission**

\* Indicates a required field

Name: RYAN BENNETT  
Previous Policy Number: N/A  
Effective Date: 2/14/2008 \*

**Premiums**

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$951.00	\$951.00	\$0.00	\$951.00

**Issue Notes**

Remarks

Available Actions

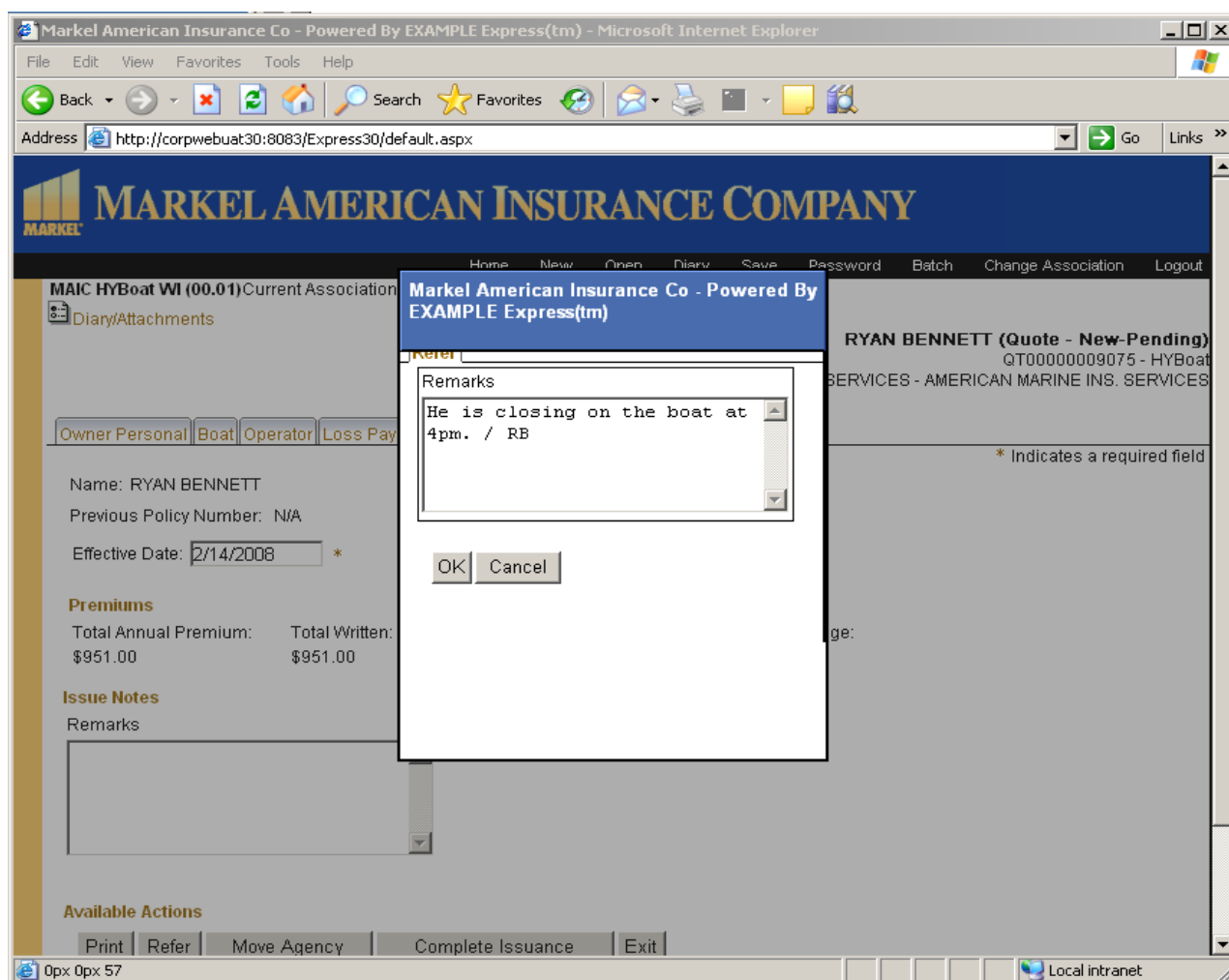
Print **Refer** Move Agency Complete Issuance Exit

« Back

Local intranet

For example, you quote a risk that requested \$1,000,000 liability limits. Your agency does not have authority to issue the policy so it needs to be referred to MAIC for approval. On the [Submission Screen](#), on the lower left-hand side is a "Refer" button. By clicking this button, you have initiated the referral process.

1. A dialog box will appear that allows you to include a message with your referral.

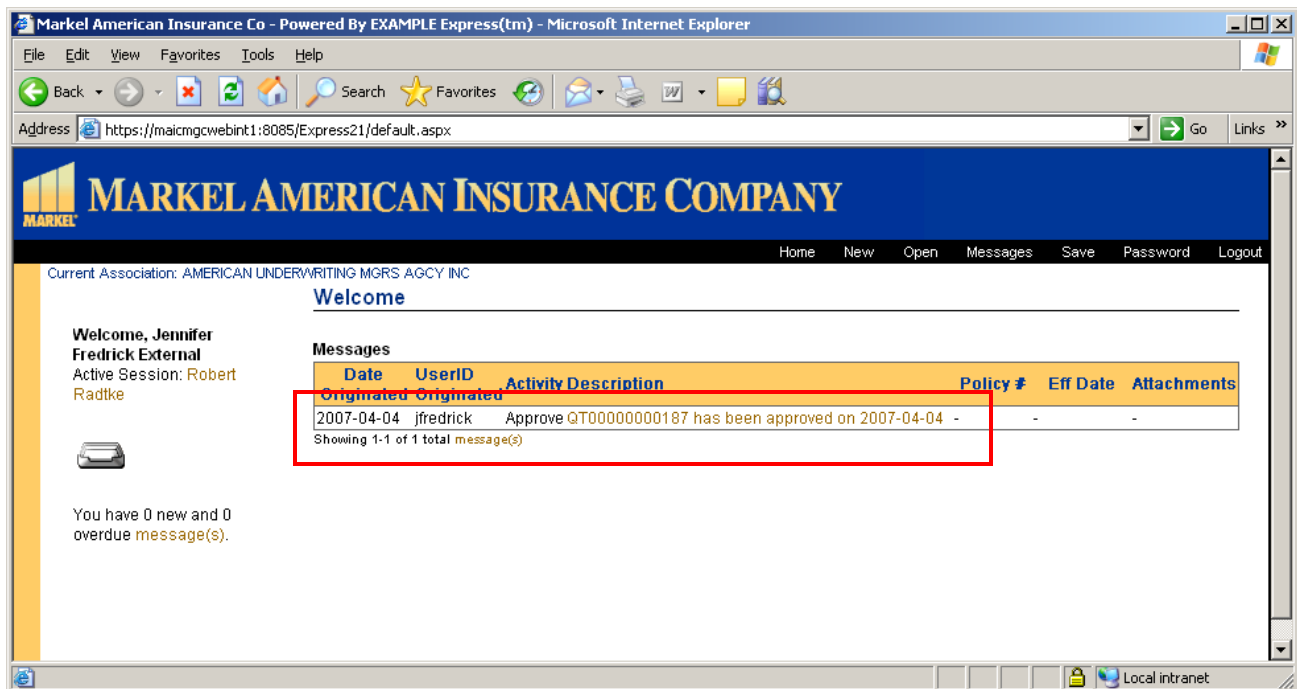


2. If desired, enter a message and click “OK”.

Given the scenario outlined above, this quote will be referred to MAIC.

**Note: Once the referral is sent, the quote is read only and is unable to be modified by the original sender.**

3. Someone at MAIC will open the message to see why the risk was referred. They will then load the policy and view what has been entered.
4. A decision will then be made. The risk will either be *approved*, *declined*, or put into *pending* status awaiting additional information.
5. Once that decision is made, a message will be sent back to your Agency. (See the screen print that follows)



If the risk is **approved**, the quote may be issued.

If the risk is **declined**, a reason should be provided to advise if anything can be provided to change that decision.

If the risk is **pending**, the message will advise what is needed prior to giving the approval or declination.

In the example above, this quote was approved. In the box outlined in red, note the Activity and the description—both indicating “Approve”.

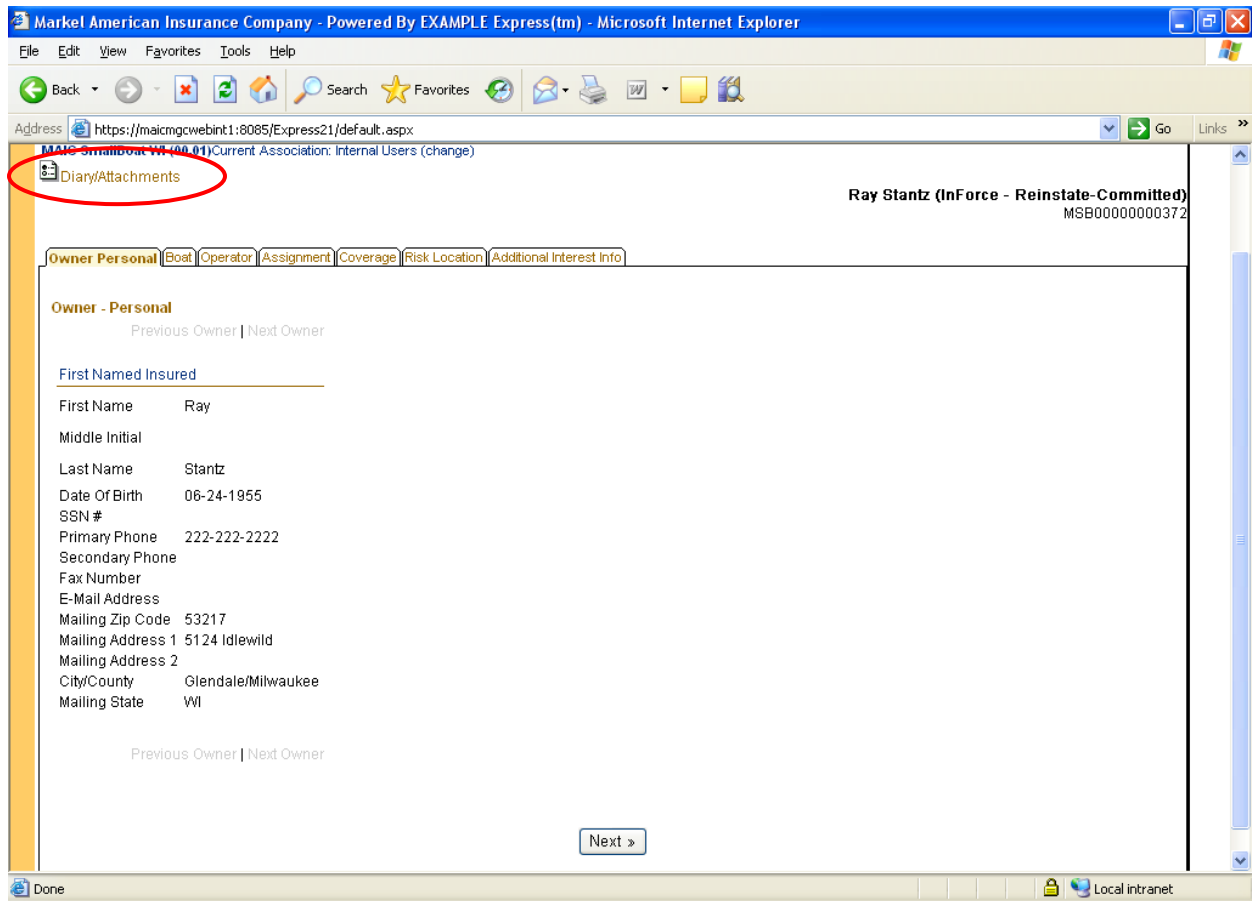
6. If a Sub-Producer is involved on the risk, you will need to advise them of the status and proceed accordingly.

**Note:** For Sub-Producers who use the Markel Marine Service Center, the referral request will be sent directly to MAIC—it will not go to the General Agent.

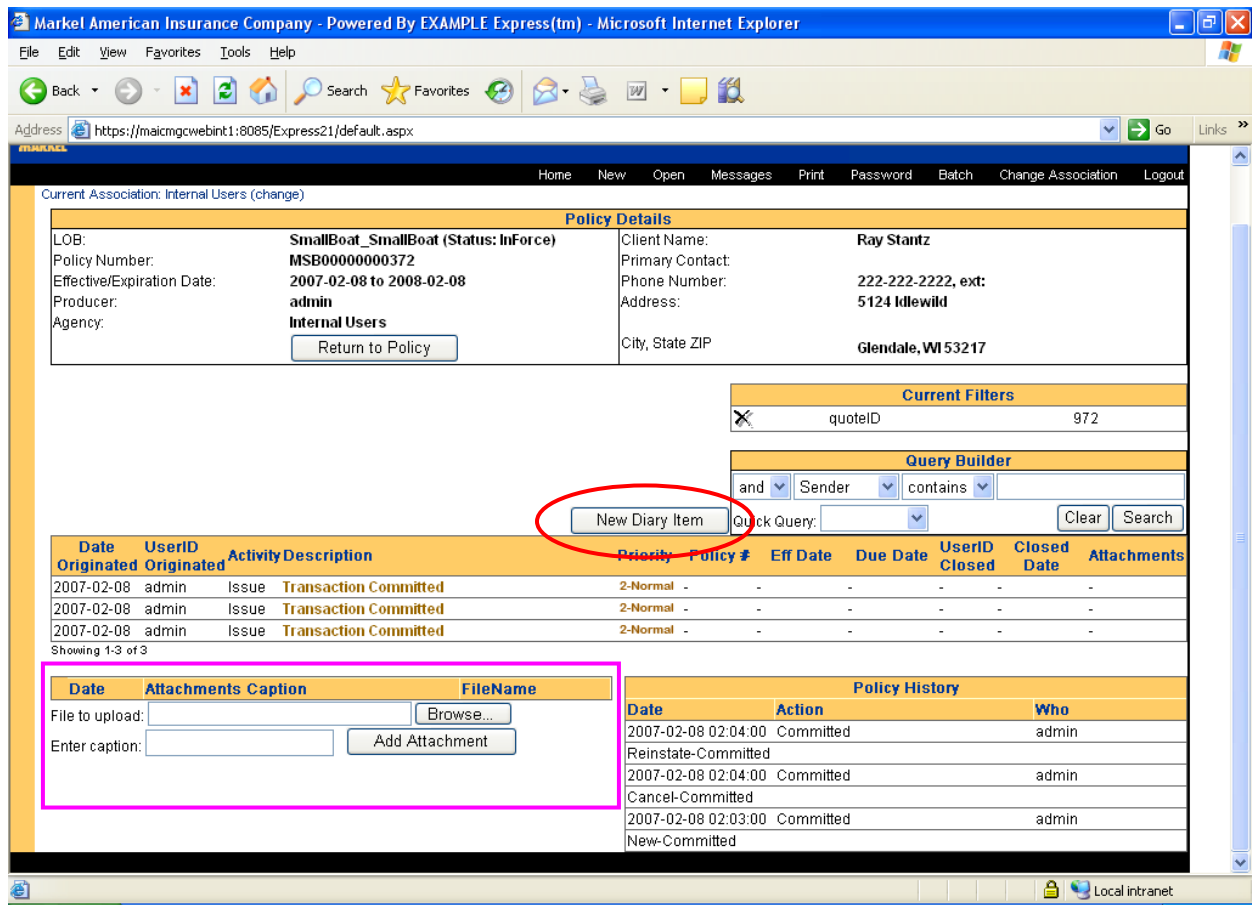
The Referral declination or approval will be sent directly back to the Sub-Producer.

## POLICY OUTPUTS AS ATTACHMENTS

At any time while in a quote or policy documents may be attached or diary entries made by clicking on the “Diary/Attachments” Icon in the upper left-hand corner. (See red oval shown below.)



Upon clicking on the “Diary/Attachments” Icon, a [Policy Details Screen](#) will display, as shown below.



The area displayed in pink above is the Attachment function.

### To add an Attachment:

1. Click on "Browse".
2. Search your computer to find the document you'd like to attach.
3. Once you've found the document, click on the document name and then click on "Open".
4. In the "Enter Caption" field, enter the name of how you would like the attachment labeled.
5. Click "Add Attachment" to attach the file to the policy.

### To add a Diary Item:

1. Click on "New Diary Item".
2. A Message Details screen will appear as shown below.

**Message Details**

\* indicates a required field.

**Message Information**

Create Date: 2/15/2008 11:29 AM  
Created By: HPLLevel1IntUser

**Policy Information**

Agency: AMERICAN UNDERWRITING MGRS  
Client: RYAN BENNETT  
Quote Number: QT00000009168

**Message**

Security Level: Internal  
Activity/Reason: Info  
Priority: Medium  
Due Date: N/A

Subject:

Body:

**Message Recipients**

Category: Policy-Level  
Recipient: N/A  
Policy/Client ID: 11388

Buttons: Close Message, Add Recipient, Update Details, Close

3. In the **Message** area, select the Security Level, if applicable.
4. Select the Activity/Reason.
5. Select the Priority.
6. Enter a Due Date, if applicable.
7. Enter a Subject.
8. Enter the Body text.
9. In the **Message Recipients** area, select the Category. If one of the “specified” categories is chosen, a list of potential Recipients will appear in a drop down box.
10. To add a Recipient, click/select their name from the drop down list, and then click the “Add Recipient” button.
11. If you would like to add an attachment, click the “Allow Attachments” button.  
Once the latter has been completed, click “Update Details”. This will send the message

## VIEWING A POLICY

Once a policy is activated, you can use the “Open” function to search for the policy.

1. Search for the policy you are looking for.

**Reminder:** Instructions on how to search for a policy or quote can be found in the section titled “Open” at the beginning of this manual.

### Open Existing Quote/Policy

Quick searches:

Name >

Quote/Policy # >>

Set LOB

Active Session: (none)

**Advanced Search**

and Name contains Add

Quick Query:

**Current Filters**

✕ Status contains InForce

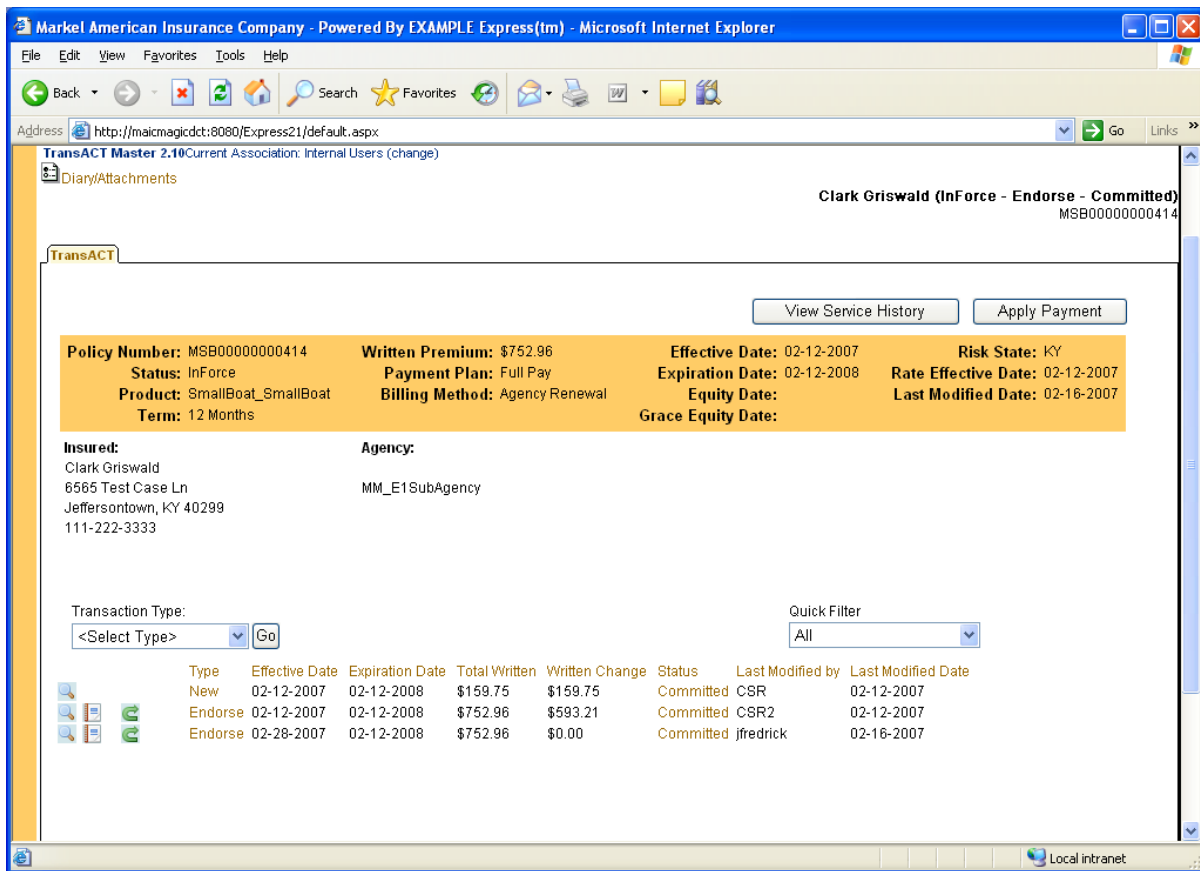
☐ Save Filter

☐ Show Deleted

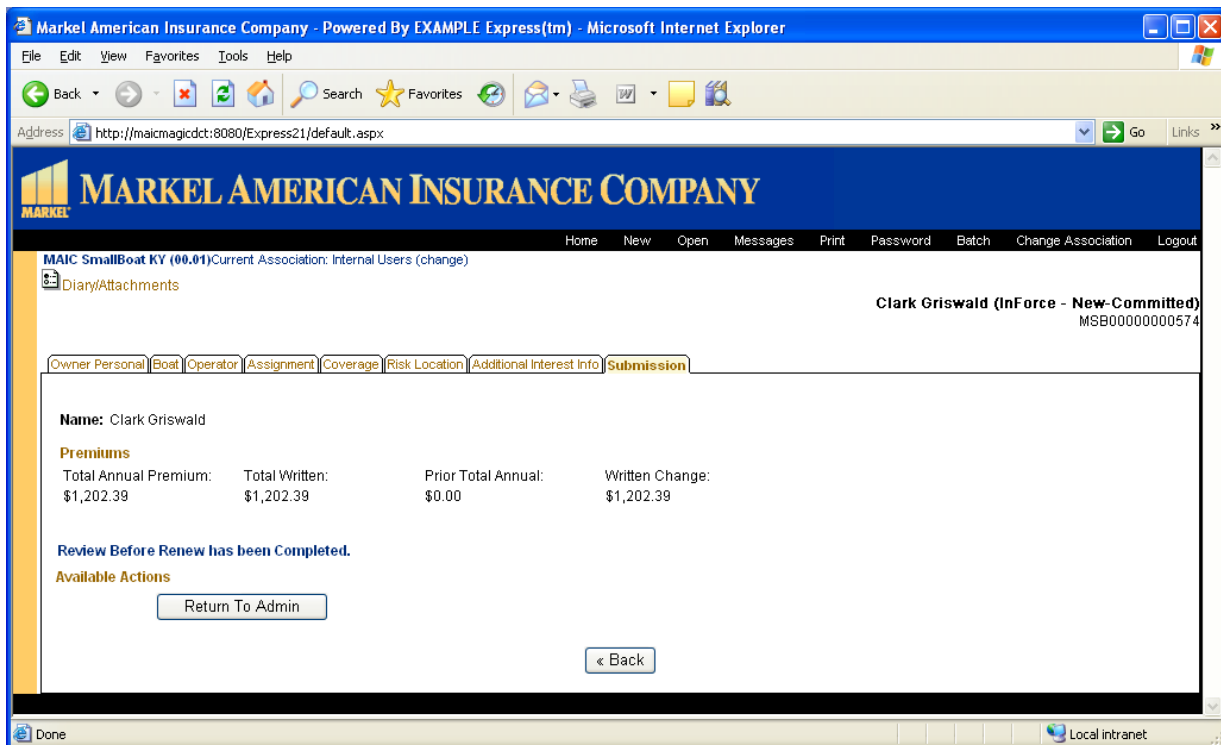
Policy/Quote Number	Insured Name	State	Line	Status	Transaction	Description	Eff. Date	Last Modified
MHP00000005374	ANGELINA JOLIE	KY	HPBoat_HPBoat	InForce	New-Committed	GA: 10224 - 0000001	2008-02-15	2008-02-20
MHP00000005375	ANGELINA JOLIET	KY	HPBoat_HPBoat	InForce	New-Committed	GA: 10224 - 0000001	2008-02-15	2008-02-20
MHP00000005319	BABY GOTBACK	WI	HPBoat_HPBoat	InForce	New-Committed	GA: 10224 - 0000001	2008-02-15	2008-02-15
MHP00000005133	CATMANAGEMENT ONE	TX	HPBoat_HPBoat	InForce	Reissue-Committed	GA: 10224 - 0000001	2008-02-08	2008-02-08
MHP00000005152	CATMANAGEMENT THREE	TX	HPBoat_HPBoat	InForce	Endorse-Referred	GA: 10224 - 0000001	2009-02-01	2008-02-14
MHP00000005138	CATMANAGEMENT TWO	TX	HPBoat_HPBoat	InForce	New-Committed	GA: 10224 - 0000001	2008-02-01	2008-02-01
MHP00000005251	FRIDAY TESTING	TX	HPBoat_HPBoat	InForce	Endorse-Pending	GA: 10224 - 0000001	2008-02-08	2008-02-08
MHP00000005210	FROSTY SNOWMAN	TX	HPBoat_HPBoat	InForce	Endorse-Pending	GA: 10224 - 0000001	2008-02-05	2008-02-05
MHP00000005035	JEREMY GREEN	GA	HPBoat_HPBoat	InForce	Reinstate-Committed	GA: 10224 - 0000001	2008-01-21	2008-01-24
MHP00000005244	JUNE BUGG	WI	HPBoat_HPBoat	InForce	New-Committed	GA: 10224 - 0000001	2008-02-10	2008-02-07

1-10 11-18 Prev Page | Next Page

2. Click on the policy number (shown on the left-hand side).
3. You will be taken to the [TransACT screen](#) as shown below.



- From the [TransACT screen](#), to simply view the policy, click on the magnifying glass, (the icon on the far left). This will allow you to view the policy as read only.
- When you are finished viewing the policy, click on the Submission tab and then click "Return to Admin". This will take you back to the [TransACT screen](#) where you started in step 3.



From the [TransACT screen](#) you may then service the policy as you normally would, including applying a payment.

*The Section that follows will cover all aspects of Policy Maintenance using TransACT.*

# TransACT—POLICY MAINTENANCE

## TransACT ICONS (Next to each transaction)

There are 3 Icons that appear on the [TransACT Screen](#) next to each transaction. (see screen shot below)

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: https://maicmgcwebint1:8085/Express21/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

TransACT Master 2.10 Current Association: Internal Users (change)

Diary/Attachments

danny noonan (InForce - Cancel - Scheduled)  
MSB00000000604

View Service History Apply Payment

**Policy Number:** MSB00000000604 **Written Premium:** \$169.34 **Effective Date:** 02-20-2007 **Risk State:** KY  
**Status:** InForce **Payment Plan:** Full Pay **Expiration Date:** 02-20-2008 **Rate Effective Date:** 02-20-2007  
**Product:** SmallBoat\_SmallBoat **Billing Method:** Agency Renewal **Equity Date:**  
**Term:** 12 Months **Grace Equity Date:**

**Insured:** danny noonan  
12423423  
414-222-5555  
**Agency:** T\_E1SubAgency

Transaction Type: <Select Type> Go Quick Filter: All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	02-20-2007	02-20-2008	\$169.34	\$169.34	Committed	admin	02-21-2007
Endorse	03-01-2007	02-20-2008	\$222.59	\$53.25	Committed	jfredrick	02-27-2007
Cancel	03-18-2007	02-20-2008	\$12.78	-\$209.80	Scheduled	jfredrick	N/A

1. 2. 3.

### 1. View Policy

Will allow you to view the policy as read only. No changes can be made.

### 2. Get Change Summary

Will display a screen showing the changes made by that transaction.

### 3. Schedule to Abort

Will prevent 'Scheduled' transaction from occurring. If the "X" is clicked, the scheduled transaction will be removed.

1. In the Transaction Type drop down box, select “Endorse” and click “Go”.

Markel American Insurance Co - Powered by EXAMPLE Express(lm) - Microsoft Internet Explorer

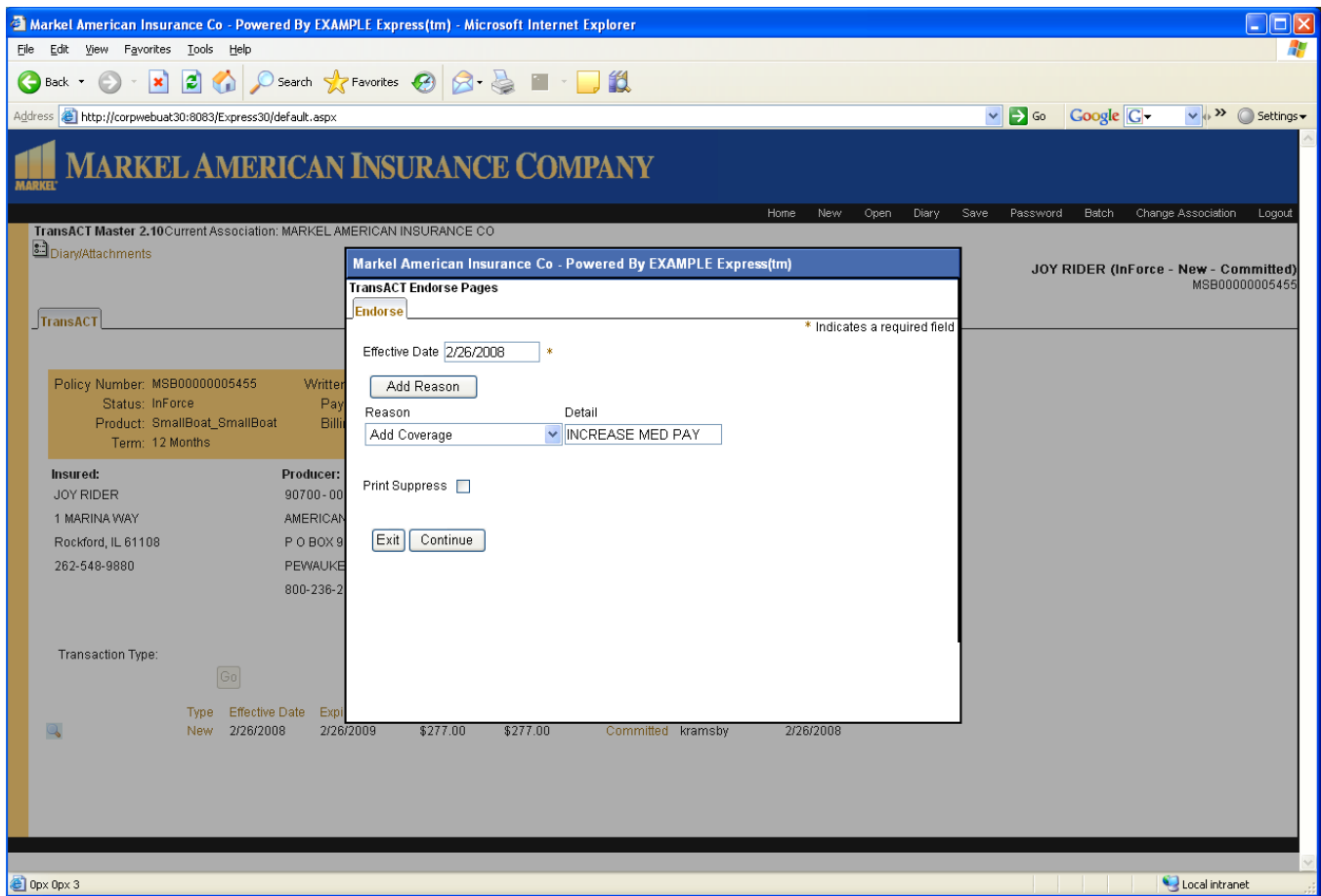
TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

JOY RIDER (InForce - New - Committed)  
MSB00000005455

Transaction Type: Endorse Go

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	krmsby	2/26/2008

2. Enter the Effective Date of your Endorsement transaction
3. Select the Reason for your transaction from the Reason drop down box (you may select multiple reasons by clicking the “Add Reason” button). Additional notes about your transaction may be entered in the “Detail” box. (See Screen Shot that follows.)

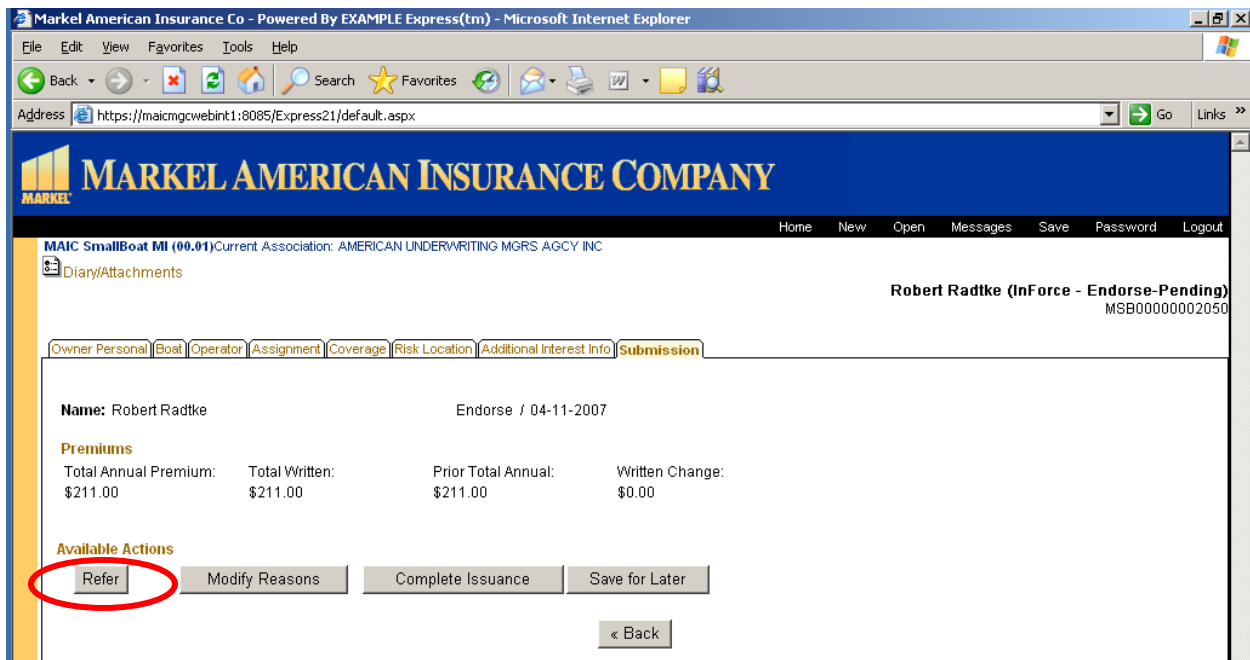


4. After you have completed the page, click “Continue”. If you do not wish to continue, click “Exit” and you will be returned to the [TransACT Screen](#).

The system will present you with the policy master pages which allow you to access any of the pages to make the necessary changes to the policy.

Upon completion of your changes, proceed to the Submission page by clicking on the “Submission” tab or continuing to click “Next”.

If the endorsement is out of the agent’s authority, a referral will be required. Click on the button labeled “Refer” circled in red.

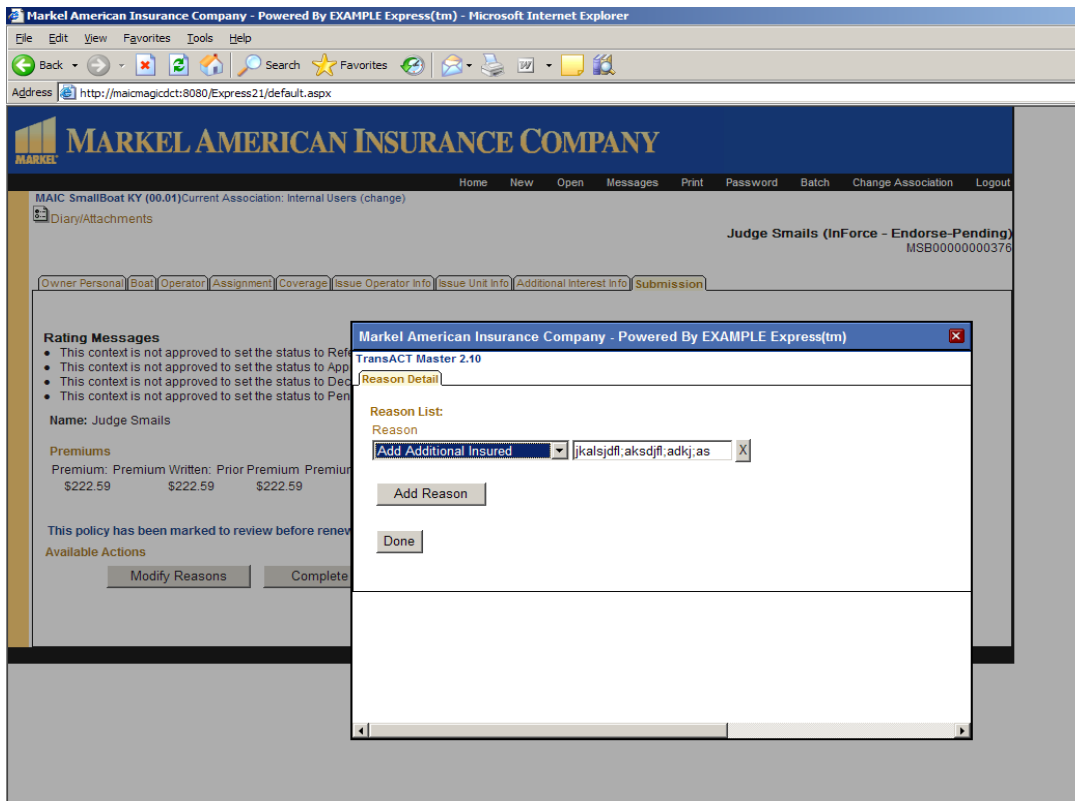


## Submission Screen:

The [Submission Screen](#) (as shown above) will show you the new premium amounts resulting from your transaction and the total amount of premium change.

## Modify Reasons:

The “Modify Reasons” button (see below) can be used to change the Reason that you selected for your transaction or to add additional Reasons.



Upon completion of your transaction, you can choose to “Complete Issuance” or “Save for Later”.

### Complete Issuance:

Will present you with a Remarks section where you can enter detailed remarks about your transaction.

The screenshot shows a web browser window titled "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://maicmagicdct:8080/Express21/default.aspx". The main content area displays the "MARKEL AMERICAN INSURANCE COMPANY" logo and a navigation menu with links: Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, Logout. Below the navigation menu, there is a section for "MAIC SmallBoat KY (00.01) Current Association: MAIC (change)". A "Diary/Attachments" tab is selected, showing a list of transactions. A "Commit Review" dialog box is open, prompting the user to enter remarks. The dialog box has a "Commit Review" button and "OK" and "Cancel" buttons. The background shows a "Rating Messages" section with a list of messages and a "Premiums" table.

Premium	Premium Written	Prior Premium	Premium
\$829.64	\$829.57	\$816.85	

### Save for Later:

Will return you to the [TransACT Screen](#) for your policy and you will see your transaction listed. You will see the status listed as "pending".

**Note:** If you process multiple changes to a policy in one day, the insured will only receive the hard copy of the last one processed that day

## CANCEL

When the Cancel function is chosen in TransACT, the ability to cancel both due to Company Request and Insured Request is given.

### Company Requested Cancellation:

1. Select your transaction type of Cancel and click "Go". (see screen that follows)

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://corpwebuat30:8083/Express30/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Diary Save Password Batch Change Association Logout

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

**JOY RIDER (InForce - Endorse - Committed)**  
MSB00000005455

TransACT

View Service History Apply Payment

Policy Number: MSB00000005455 Written Premium: \$277.00 Effective Date: 2/26/2008 Risk State: IL  
Status: InForce Payment Plan: Full Pay Expiration Date: 2/26/2009 Rate Effective Date: 2/26/2008  
Product: SmallBoat\_SmallBoat Billing Method: Direct Bill Equity Date: Last Modified Date: 2/26/2008  
Term: 12 Months Grace Equity Date:

**Insured:**  
JOY RIDER  
1 MARINA WAY  
Rockford, IL 61108  
262-548-9880

**Producer:**  
90700-0000001  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

**Agency:**  
90700  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

Transaction Type: Cancel Go Quick Filter: All

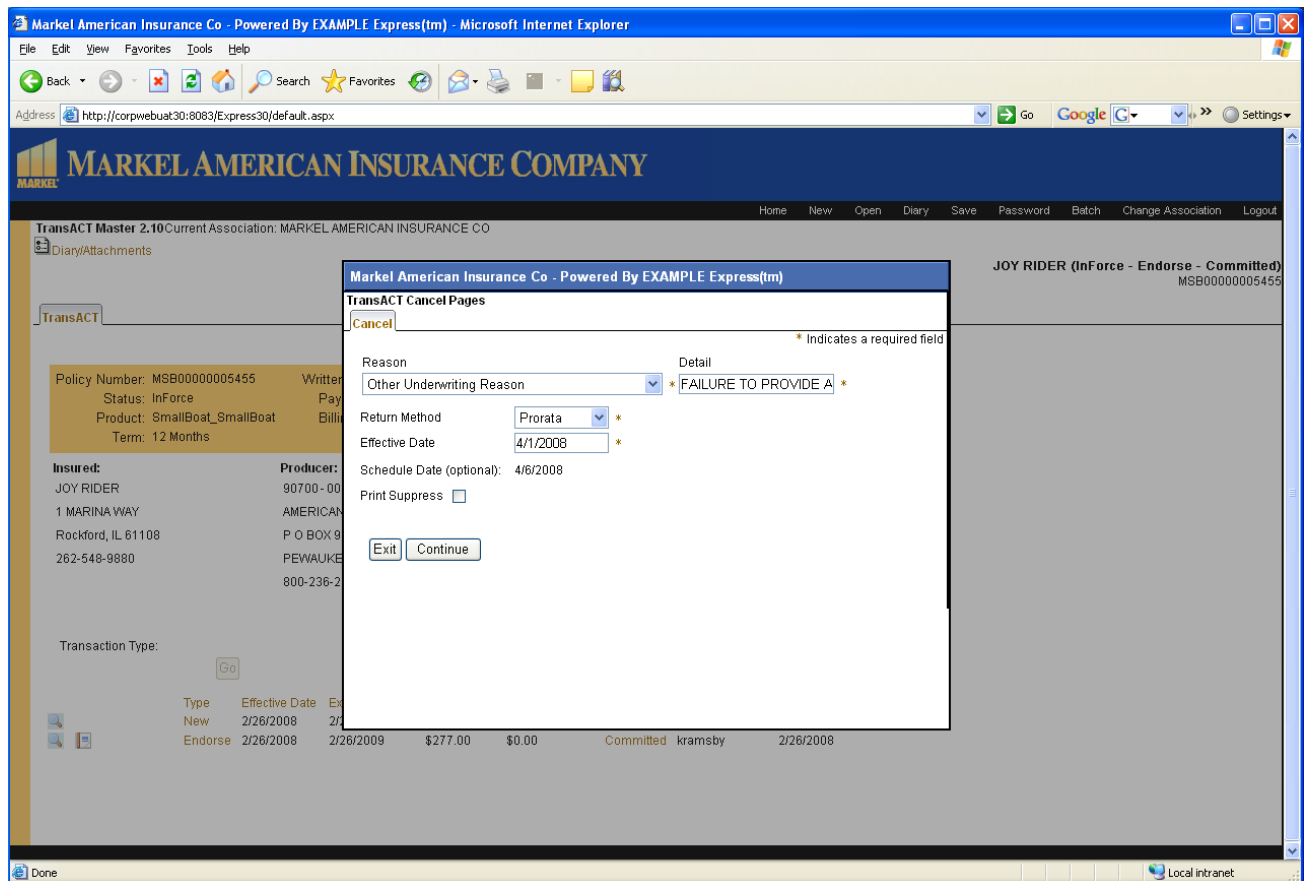
Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	2/26/2008
Endorse	2/26/2008	2/26/2009	\$277.00	\$0.00	Committed	kramsby	2/26/2008

2. Select a Reason for cancellation from the drop down box.

For company request cancels you must also fill in the Detail box with more specific, appropriate detail as this verbiage will also print on the Cancellation form.

Ex. You select the reason called "Unacceptable Driving Record" but in the detail box (see below) you insert: "Speeding violations: 1/2007, 3/2006, etc."

You need to put enough detail that the insured understands exactly why they were canceled because if you do not, in some states the cancellation form will be considered unacceptable and void.

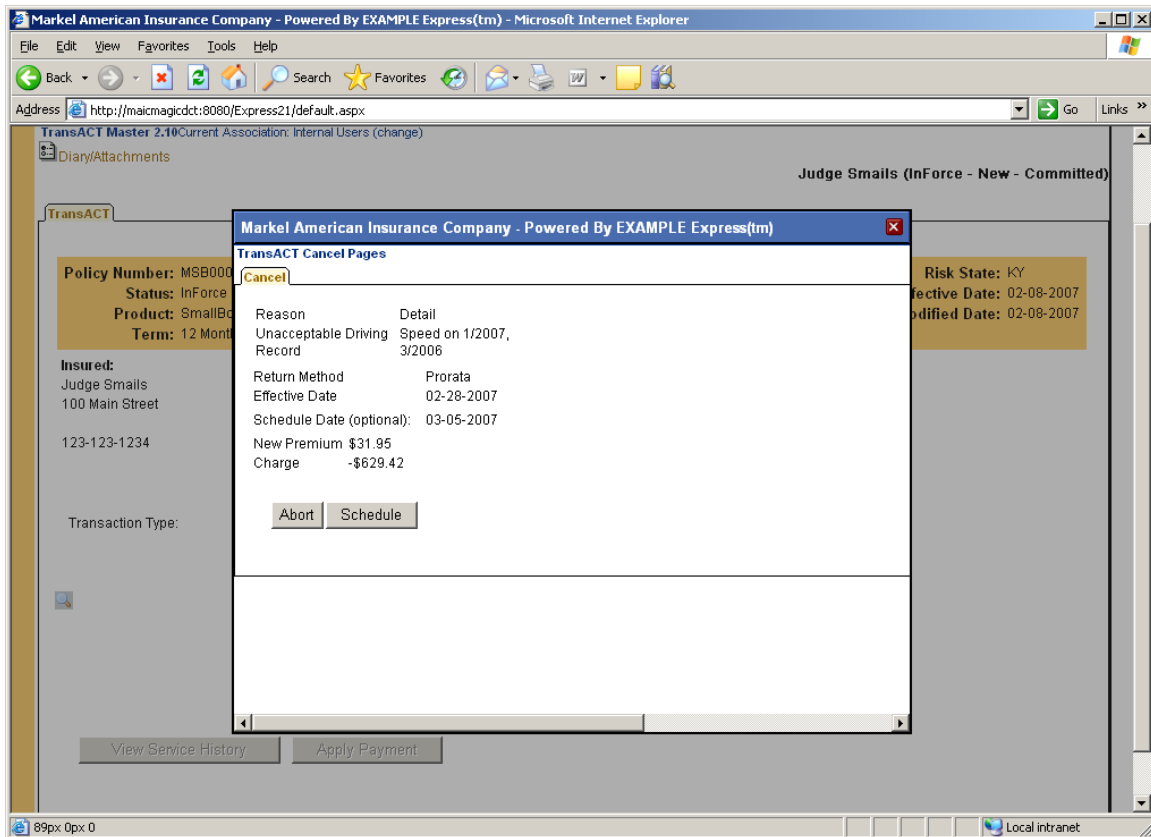


3. The Return Method box will automatically populate with the cancel method choices you have based on the Reason for Cancellation. You must choose a method.

The Reason you selected in Step 1 above determined that this was a Company Request cancellation so the system automatically populated the Cancellation Effective date with the earliest legal cancel date based on state requirements and proper mailing time.

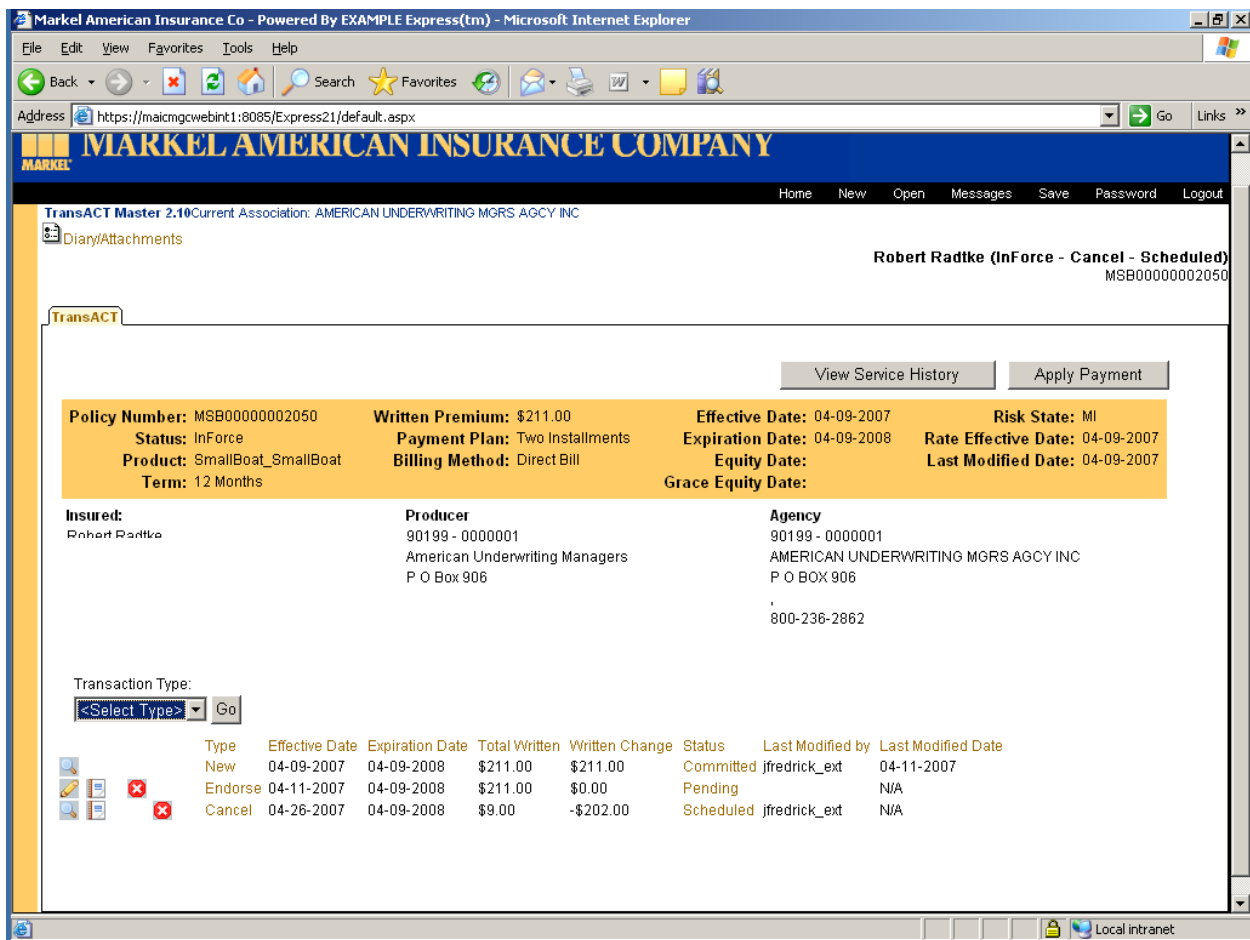
Note: The “Schedule Date” will tell you the actual day that the system will change the policy status from InForce to Cancel and is informational only.

4. Click the “Continue” button to proceed OR “Exit” to return to the [TransACT Screen](#).



The next screen will now show you the new written premium on this policy along with the unearned premium (negative written change) that will be applied once the policy is truly cancelled.

5. Click the “Schedule” button to finish the Cancellation transaction and be returned to the main [TransACT Screen](#) OR click the “Abort” button if you want to back out from the transaction and return to main [TransACT Screen](#).



The main **TransACT Screen** will show you that your Cancellation is 'scheduled' and will display the effective date as well.

Scheduling the transaction will cause the Direct Notice of Cancellation to print and be sent to the customer the next morning.

If you click the "Abort" button ( Red 'X' to the left of the Cancel transaction), then you will abort the scheduled cancel and if the notice was already printed, a continuation notice will be sent to the customer to tell them their policy will not be cancelled.

Ex. You scheduled a cancellation on the policy for lack of an updated survey but then you received the survey from the customer, so you use the "Abort" function which will remove the scheduled cancellation and will generate a continuation notice during the nightly batch which will be mailed the next business day.

**Note:** In the example shown above, the policy will officially be cancelled as of **4/26/2007** (policyholder has no coverage from this point on).

The policy status in the system will not change from Inforce to Canceled until the transaction is Committed during the nightly batch run on 5/1/2007.

## Insured Requested Cancellation:

1. Select your transaction type of Cancel and click “Go”.

Markel American Insurance Co. - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://corpwebuat30:8083/Express30/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Diary Save Password Batch Change Association Logout

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

JOY RIDER (InForce - Reinstate - Committed)  
MSB00000005455

TransACT

View Service History Apply Payment

Policy Number: MSB00000005455 Written Premium: \$277.00 Effective Date: 2/26/2008 Risk State: IL  
Status: InForce Payment Plan: Full Pay Expiration Date: 2/26/2009 Rate Effective Date: 2/26/2008  
Product: SmallBoat\_SmallBoat Billing Method: Direct Bill Equity Date: Last Modified Date: 2/26/2008  
Term: 12 Months Grace Equity Date:

**Insured:**  
JOY RIDER  
1 MARINA WAY  
Rockford, IL 61108  
262-548-9880

**Producer:**  
90700 - 0000001  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

**Agency:**  
90700  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

Quick Filter: All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	2/26/2008
Endorse	2/26/2008	2/26/2009	\$277.00	\$0.00	Committed	kramsby	2/26/2008
Cancel	2/26/2008	2/26/2009	\$0.00	-\$277.00	Committed	kramsby	2/26/2008
Reinstate	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	2/26/2008

2. Select a Reason for cancellation from the drop down box.
3. If the Detail box is required, please enter any required, appropriate details/reasons.
4. The Return Method box will automatically populate with the cancel method choices you have based on the Reason for Cancellation. You must choose a method.

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

TransACT

Policy Number: MSB00000005455  
Status: InForce  
Product: SmallBoat\_SmallBoat  
Term: 12 Months

Insured:  
JOY RIDER  
1 MARINA WAY  
Rockford, IL 61108  
262-548-9880

Producer:  
90700-00  
AMERICAN  
P.O. BOX 9  
PEWAUKEE  
800-236-2

TransACT Cancel Pages

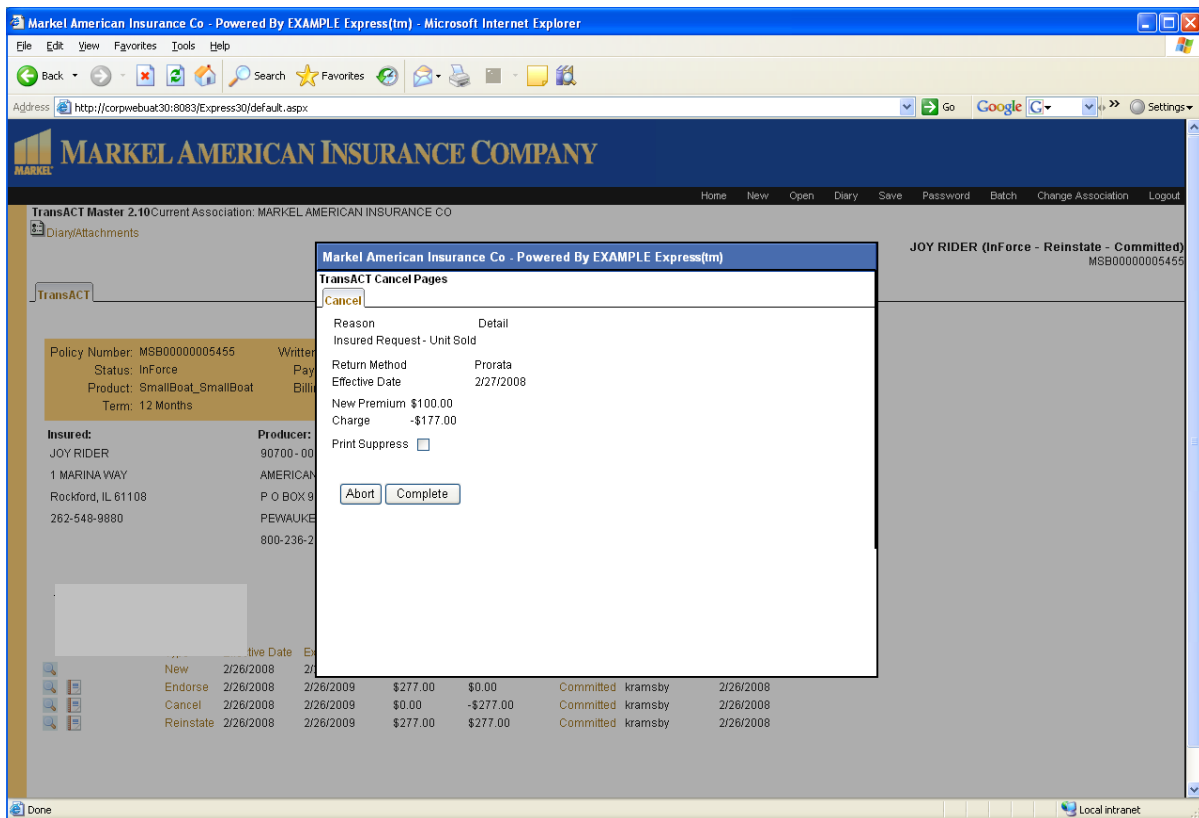
Reason: Insured Request - Unit Sold  
Return Method: Prorata  
Effective Date: 03/01/08  
Print Suppress: ☐

Exit Continue

Transaction	Effective Date	Expiry Date	Amount	Balance	Status	Agent	Effective Date
New	2/26/2008	2/26/2009	\$277.00	\$0.00	Committed	kramsby	2/26/2008
Endorse	2/26/2008	2/26/2009	\$0.00	-\$277.00	Committed	kramsby	2/26/2008
Cancel	2/26/2008	2/26/2009	\$0.00	-\$277.00	Committed	kramsby	2/26/2008
Reinstate	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	2/26/2008

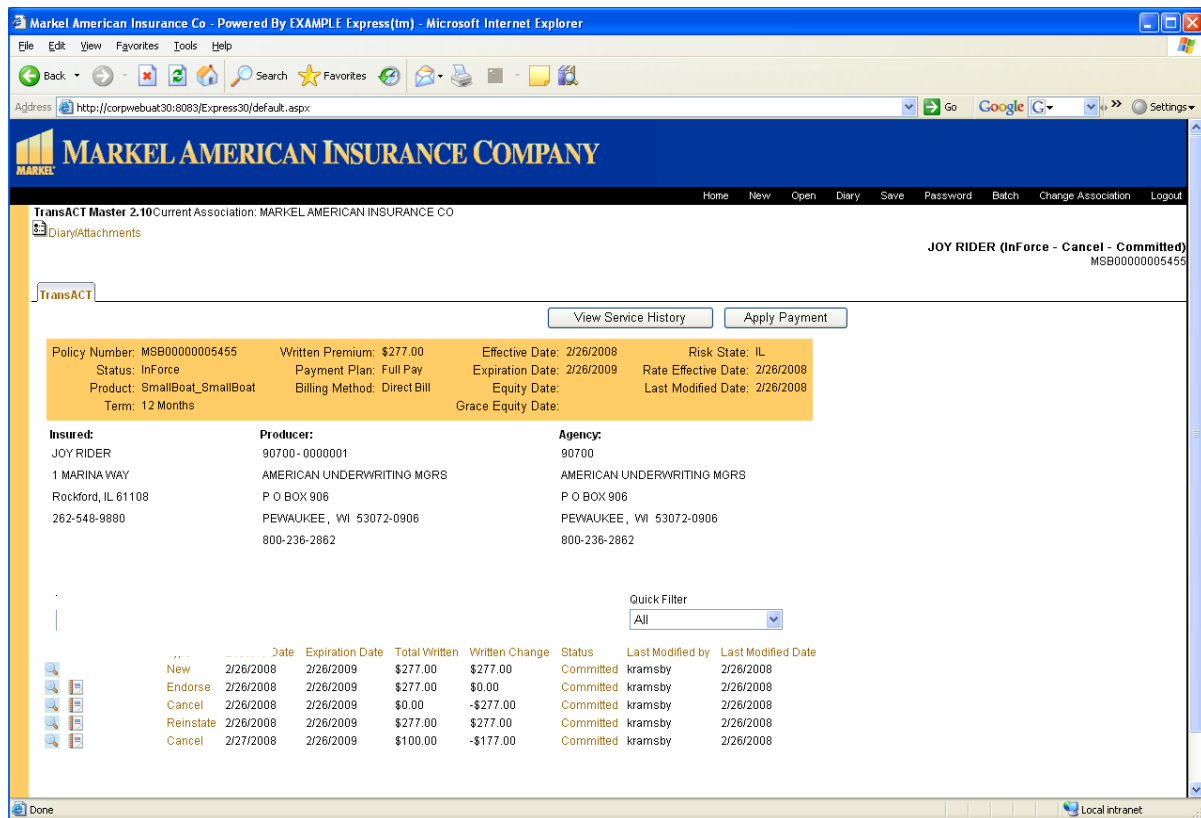
The Cancellation effective date should be entered based on the date requested by the insured. The system automatically populates today's date so you will need to adjust date accordingly.

- Click the "Continue" button to proceed OR "Exit" if you want to return to the [TransACT Screen](#) with no changes.



The next screen (as previously shown) will show you the new written premium on this policy along with the unearned premium (negative written change) that will be applied once the policy is truly cancelled.

- Click the “Complete” button to finish the Cancellation transaction and be returned to the main [TransACT Screen](#) OR click the “Abort” button if you want to back out from the transaction and return to main [TransACT Screen](#).



Once you return to the main [TransACT Screen](#), it will show you that the transaction has been Committed and the insured's policy is cancelled as of the date requested. No forms will be generated.

## REINSTATE

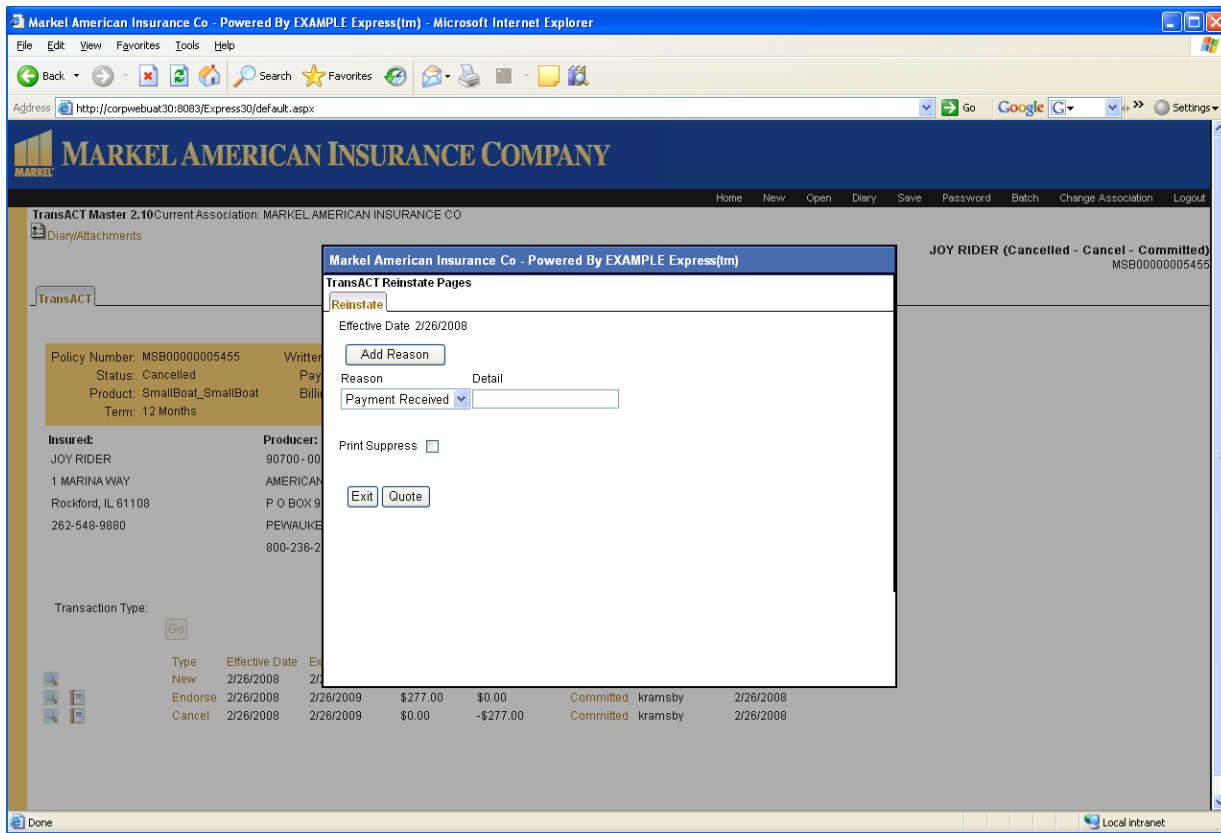
Reinstate will be available in the dropdown box if this is an allowed transaction on the policy.

1. Select “Reinstate” and Click “Go”.

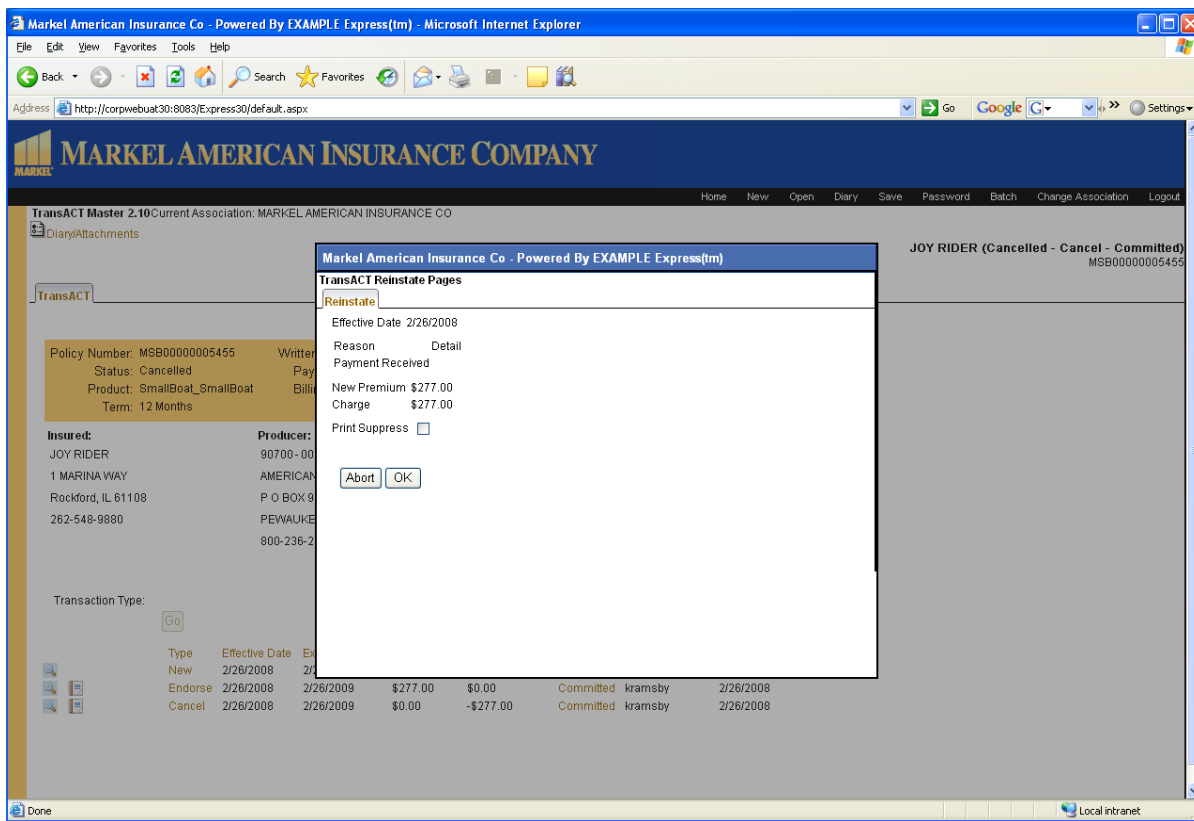
The screenshot displays the Markel American Insurance Company TransACT Master 2.10 interface. The browser window title is "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://corpwebuat30:8083/Express30/default.aspx". The page header includes the Markel logo and the company name "MARKEL AMERICAN INSURANCE COMPANY". The navigation bar contains links: Home, New, Open, Diary, Save, Password, Batch, Change Association, and Logout. The main content area shows the "TransACT Master 2.10" interface with the current association "MARKEL AMERICAN INSURANCE CO". The policy details for "JOY RIDER (Cancelled - Cancel - Committed)" with policy number "MSB00000005455" are displayed. The "Transaction Type" dropdown is set to "Reinstate", and the "Go" button is visible. The "Quick Filter" dropdown is set to "All". A table of transactions is shown below.

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	2/26/2008
Endorse	2/26/2008	2/26/2009	\$277.00	\$0.00	Committed	kramsby	2/26/2008
Cancel	2/26/2008	2/26/2009	\$0.00	-\$277.00	Committed	kramsby	2/26/2008

2. The Effective date is automatically populated by the system and the date is equal to the previous cancel date.
3. Choose a reason for the reinstatement and enter any necessary detail. The Add Reason button is to be used if you want to show multiple reasons for reinstatement.



- Click the "Quote" button to proceed (as shown above).



- Click "OK" to proceed with Reinstatement OR click the "Abort" button to back out of transaction and be returned to [TransACT Screen](#) without action.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites RSS Print Mail Address Book

Address http://corpwebuat30:8083/Express30/default.aspx Go Google Settings

# MARKEL AMERICAN INSURANCE COMPANY

Home New Open Diary Save Password Batch Change Association Logout

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

**JOY RIDER (Cancelled - Cancel - Committed)**  
MSB00000005456

TransACT View Service History

Policy Number: MSB00000005455	Written Premium: \$277.00	Effective Date: 2/26/2008	Risk State: IL
Status: InForce	Payment Plan: Full Pay	Expiration Date: 2/26/2009	Rate Effective Date: 2/26/2008
Product: SmallBoat_SmallBoat	Billing Method: Direct Bill	Equity Date:	Last Modified Date: 2/26/2008
Term: 12 Months	Grace Equity Date:		

<b>Insured:</b> JOY RIDER 1 MARINA WAY Rockford, IL 61108 262-548-9880	<b>Producer:</b> 90700 - 0000001 AMERICAN UNDERWRITING MGRS P O BOX 906 PEWAUKEE, WI 53072-0906 800-236-2862	<b>Agency:</b> 90700 AMERICAN UNDERWRITING MGRS P O BOX 906 PEWAUKEE, WI 53072-0906 800-236-2862
--	---	---

Transaction Type: <Select Type> Go Quick Filter: All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	
Endorse	2/26/2008	2/26/2009	\$277.00	\$0.00	Committed	kramsby	
Cancel	2/26/2008	2/26/2009	\$0.00	-\$277.00	Committed	kramsby	
Reinstate	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	

Done Local intranet

You will be returned to the [TransACT Screen](#) and the Reinstate transaction should negate the Written Change column and Total Written Premium should be returned to previous number.

## REISSUE

Reissue will be available in the dropdown box if this is an allowed transaction on the policy.

A policy may be reissued up to 7 days prior to the effective date of the policy if the cancellation method used is flat. The policy must be rewritten equal to or greater than the current cancellation date if the cancellation method used is pro-rata.

1. Select "Reissue" and Click "Go".

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://corpwebuat30:8083/Express30/default.aspx

MARKEL AMERICAN INSURANCE COMPANY

Home New Open Diary Save Password Batch Change Association Logout

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

JOY RIDER (InForce - Cancel - Committed)  
MSB00000005455

TransACT

View Service History Apply Payment

Policy Number: MSB00000005455 Written Premium: \$277.00 Effective Date: 2/26/2008 Risk State: IL  
Status: InForce Payment Plan: Full Pay Expiration Date: 2/26/2009 Rate Effective Date: 2/26/2008  
Product: SmallBoat\_SmallBoat Billing Method: Direct Bill Equity Date: Last Modified Date: 2/26/2008  
Term: 12 Months Grace Equity Date:

Insured:  
JOY RIDER  
1 MARINA WAY  
Rockford, IL 61108  
262-548-9880

Producer:  
90700 - 0000001  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

Agency:  
90700  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

Transaction Type: Reissue Quick Filter: All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	2/26/2008
Endorse	2/26/2008	2/26/2009	\$277.00	\$0.00	Committed	kramsby	2/26/2008
Cancel	2/26/2008	2/26/2009	\$0.00	-\$277.00	Committed	kramsby	2/26/2008
Reinstate	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	2/26/2008
Cancel	2/27/2008	2/26/2009	\$100.00	-\$177.00	Committed	kramsby	2/26/2008

2. Verify the effective date of the reissue and change if needed.
3. Click on drop down box to change the no to yes if you are reissuing the policy to change the agent or the mooring state. This will enable you to change the agent or state.
4. If the reissue is for any other reason, click on the drop down box and select the applicable reason. If you have more than one reason you need to enter, click on the add reason box. (See screen print below)

**Note:** The re-pull insurance score reason can only be used if the insured provides written proof that there was an error on their report that has now been corrected. This will be an audit item.

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: http://corpwebuat30:8083/Express30/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Diary Save Password Batch Change Association Logout

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

**TransACT**

Policy Number: MSB00000005455  
Status: InForce  
Product: SmallBoat\_SmallBoat  
Term: 12 Months

**Insured:**  
JOY RIDER  
1 MARINA WAY  
Rockford, IL 61108  
262-548-9880

**Producer:**  
90700-00  
AMERICAN  
P O BOX 9  
PEWAUKEE  
800-236-2

Transaction Type:

Effective Date: 2/27/2008

\*\*\* Please verify Effective Date is correct \*\*\*

Show Move Agency Option: No

Show Move State Option: No

Show Move Manuscript Option: No

Reason: (select) Detail:

Print Suppress: ☐

Type	Effective Date	Ex							
New	2/26/2008	2/26/2009	\$277.00	\$0.00	Committed	kramsby	2/26/2008		
Endorse	2/26/2008	2/26/2009	\$0.00	-\$277.00	Committed	kramsby	2/26/2008		
Cancel	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	2/26/2008		
Reinstate	2/27/2008	2/26/2009	\$100.00	-\$177.00	Committed	kramsby	2/26/2008		

JOY RIDER (InForce - Cancel - Committed)  
MSB00000005455

Done Local intranet

- Click "Continue" to proceed or "Exit" to stop processing the reissue.
- Amend the policy as needed.
- Click the submission tab to be taken to the last page of the reissue. (See the screen print below)

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://maimagicdct:8080/Express21/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Messages Password Batch Logout

MAIC SmallBoat FL (00.01) Current Association: Internal Users

Diary/Attachments

test flaminearned (Cancelled - Reissue-Pending)  
MSB00000002016

Owner Personal Boat Operator Assignment Coverage Risk Location Additional Interest Info **Submission**

Name: test flaminearned Reissue / 03-14-2007

**Premiums**

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$205.00	\$205.00	\$0.00	\$205.00

**Issue Notes**

Remarks

Available Actions

Modify Reasons Complete Issuance

Back

Local intranet

8. Add any applicable comments and click "Complete Issuance".

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://maimagicdct:8080/Express21/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Messages Save Password Batch Logout

MAIC SmallBoat IIC (00.02) Current Association: Internal Users

Diary/Attachments

Owner Personal Boat Operator Assignment **Payment Information**

Name: BRIAN W. WHITE

**Premiums**

Total Annual Premium:	Total Written:
\$764.00	\$764.00

**Issue Notes**

Remarks

Available Actions

Modify Reasons

**MAIC SmallBoat IIC (00.02)**

**Payment Information**

\* Indicates a required field.

**Policy Information**

Full Annual Premium	Policy Term	Coverage Start Date
\$764.00	12 Months	06-22-2007 (mm/dd/yyyy)

**Payment**

Payment Plan: Full Pay +

Payment Type: (select) +

Amount: Minimum Payment Amount

Amount: +\$764.00

Cancel Commit Without Payment

View Payment Schedules

WHITE (Cancelled - Reissue-Pending)  
MSB00000003007

OpX OpX 0

Local intranet

9. Verify Pay Plan is correct and click Commit Without Payment.

## REVIEW BEFORE RENEW

1. Choose the Review before Renew option and click “Go”.

**Note: You cannot perform this action on a policy that has a committed cancel, is scheduled for non-renewal or has a pending renewal.**

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://corpwebuat30:8083/Express30/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Diary Save Password Batch Change Association Logout

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

**BUD LIGHT (InForce - Endorse - Committed)**  
MHP00000005086

TransACT

View Service History Apply Payment

Policy Number: MHP00000005086 Written Premium: \$5,836.00 Effective Date: 1/23/2008 Risk State: UT  
Status: InForce Payment Plan: Six Installments Expiration Date: 1/23/2009 Rate Effective Date: 1/28/2008  
Product: HPBoat\_HPBoat Billing Method: Direct Bill Equity Date: Last Modified Date: 1/28/2008  
Term: 12 Months Grace Equity Date:

**Insured:**  
BUD LIGHT  
1 MAIN ST  
Boneta, UT 84001  
262-548-9880

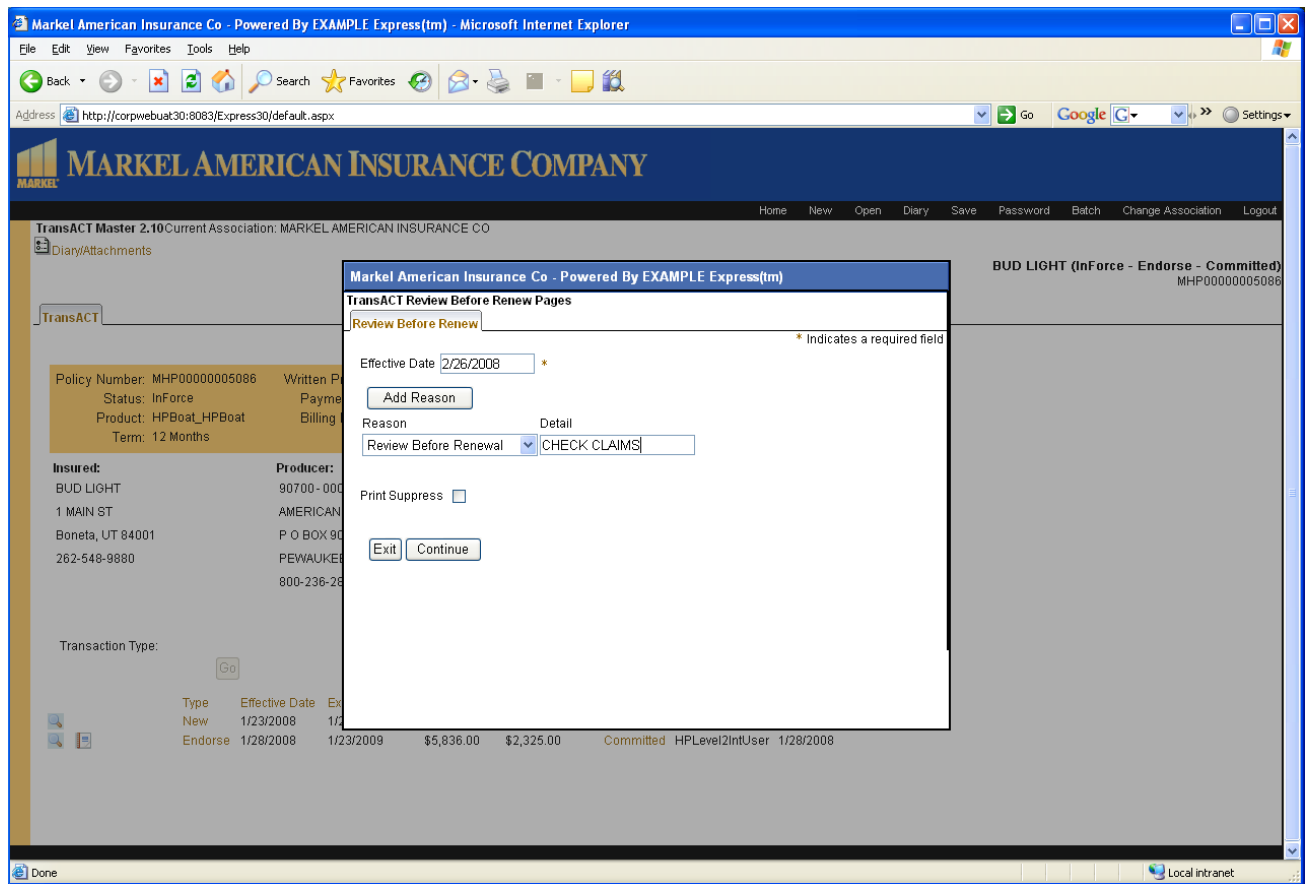
**Producer:**  
90700 - 0000001  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

**Agency:**  
90700  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

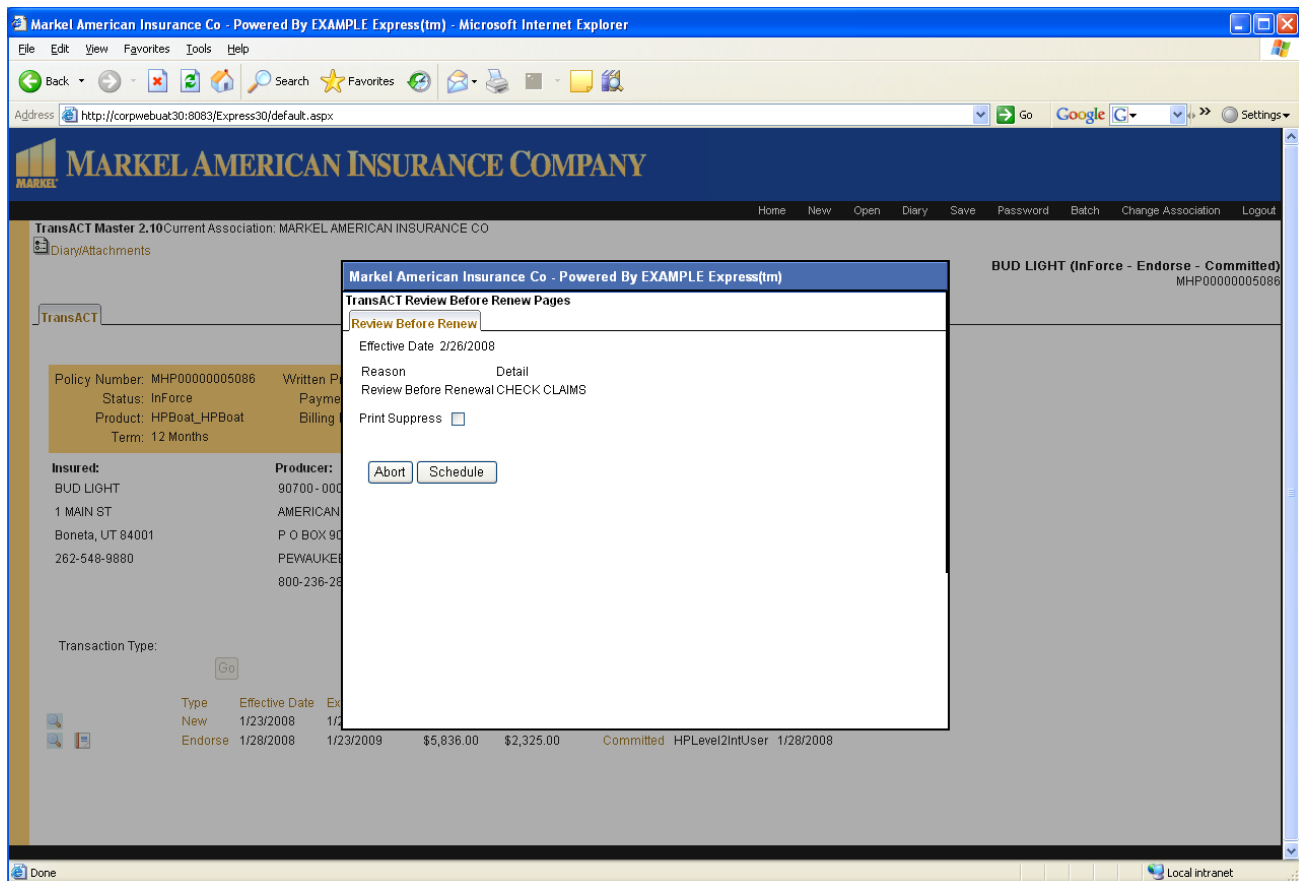
Transaction Type: Review Before Renew Go Quick Filter: All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	1/23/2008	1/23/2009	\$3,511.00	\$3,511.00	Committed	HPLevel2IntUser	1/28/2008
Endorse	1/28/2008	1/23/2009	\$5,836.00	\$2,325.00	Committed	HPLevel2IntUser	1/28/2008

The Effective date is automatically populated by the system.



2. Enter in the details of why you want to review before policy automatically renews.
3. Click the “Continue” button to proceed or “Exit” to return to [TransACT Screen](#).



4. Click “Abort” if you’ve changed your mind about marking this policy for Review before Renew and want to be returned to the [TransACT Screen](#) OR click “Schedule” if you want to Mark the policy for Review before Renew.

The policy will show that you have scheduled this policy to be reviewed before it is automatically renewed in the future.

The Review before Renewal report will generate 90 days prior to the renewal date.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://corpwebuat30:8083/Express30/default.aspx

## MARKEL AMERICAN INSURANCE COMPANY

Home New Open Diary Save Password Batch Change Association Logout

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

**BUD LIGHT (InForce - ReviewBeforeRenew - Scheduled)**  
MHP00000005086

TransACT

View Service History Apply Payment

Policy Number: MHP00000005086	Written Premium: \$5,836.00	Effective Date: 1/23/2008	Risk State: UT
Status: InForce	Payment Plan: Six Installments	Expiration Date: 1/23/2009	Rate Effective Date: 1/28/2008
Product: HPBoat_HPBoat	Billing Method: Direct Bill	Equity Date:	Last Modified Date: 1/28/2008
Term: 12 Months	Grace Equity Date:		

**Insured:**  
BUD LIGHT  
1 MAIN ST  
Boneta, UT 84001  
262-548-9880

**Producer:**  
90700 - 0000001  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAWKEE, WI 53072-0906  
800-236-2862

**Agency:**  
90700  
AMERICAN UNDERWRITING MGRS  
P O BOX 906  
PEWAWKEE, WI 53072-0906  
800-236-2862

This policy has been marked for Review Before Renew.

Transaction Type:  Quick Filter:

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	1/23/2008	1/23/2009	\$3,511.00	\$3,511.00	Committed	HPLevel2IntUser	1/28/2008
Endorse	1/28/2008	1/23/2009	\$5,836.00	\$2,325.00	Committed	HPLevel2IntUser	1/28/2008
ReviewBeforeRenew	2/26/2008	1/23/2009	\$5,836.00	\$0.00	Scheduled	krambsby	N/A

- To review the policy, click the Pencil icon (far left icon on the same transaction line of Review before Renew) and you will be taken into the policy to review it.
- Once your review is complete, proceed to the [Submission Screen](#) (as shown below).

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://corpwebuat30:8083/Express30/default.aspx

## MARKEL AMERICAN INSURANCE COMPANY

Home New Open Diary Save Password Batch Change Association Logout

MAIC HPBoat UT (00.01) Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

**BUD LIGHT (InForce - ReviewBeforeRenew-Scheduled)**  
MHP00000005086 - HPBoat  
AMERICAN UNDERWRITING MGRS - AMERICAN UNDERWRITING MGRS

Owner Personal Boat Operator Assignment Loss Payee Info Coverage **Submission**

Name: BUD LIGHT

Previous Policy Number: N/A ReviewBeforeRenew / 02-26-2008

**Premiums**

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$5,869.00	\$5,836.00	\$5,836.00	\$0.00

This policy has been marked to review before renew.

**Billing Instructions**

Bill Insured

**Billing Information**

Name: BUD LIGHT  
ZIP: 84001  
Address 1: 1 MAIN ST  
Address 2:  
City/County: Boneta/Duchesne  
State: UT

**Available Actions**

Modify Reasons Review Completed Return To Admin

« Back

### Return to Admin:

This will take you back to the [TransACT Screen](#) and keep your Review before Renew transaction in a 'Scheduled' state. This means that it is still in a Review before Renew status and will show up in any messages/reports as such.

### Review Completed:

This will take you to the Remarks screen.

The screenshot displays the Markel American Insurance Company web application interface. The browser window title is "Markel American Insurance Co - Powered By EXAMPLE E Express(tm) - Microsoft Internet Explorer". The address bar shows "http://corpwebuat30:8083/Express30/default.aspx". The main header features the Markel logo and the company name. Below the header, there is a navigation bar with links: Home, New, Open, Diary, Save, Password, Batch, Change Association, and Logout. The main content area is titled "MAIC HPBoat UT (00.01) Current Association: MARKEL AMERICAN INSURANCE CO". It contains several sections: "Owner Personal", "Boat", "Operator", "Assignment", "Loss Payee Info", and "Coverages". The "Owner Personal" section shows "Name: BUD LIGHT" and "Previous Policy Number: N/A". The "Premiums" section shows "Total Annual Premium: \$5,869.00", "Total Written: \$5,836.00", and "Prior Total Annual: \$5,836.00". The "Billing Instructions" section shows "Bill Insured". The "Billing Information" section shows "Name: BUD LIGHT", "ZIP: 84001", "Address 1: 1 MAIN ST", "Address 2: ", "City/Country: Boneta/Duchesne", and "State: UT". The "Available Actions" section shows buttons for "Modify Reasons", "Review Completed", and "Return To Admin". A "Commit Transaction" dialog box is open in the center, with a "Remarks" text area containing "NO CLAIMS" and "OK" and "Cancel" buttons. The status bar at the bottom shows "Done" and "Local intranet".

7. Type in any remarks that you would like saved with this transaction.

8. Click "OK" to return to the [TransACT Screen](#).

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Print Mail

Address http://corpwebuat30:8083/Express30/default.aspx Go Google Settings

# MARKEL AMERICAN INSURANCE COMPANY

Home New Open Diary Save Password Batch Change Association Logout

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

**BUD LIGHT (InForce - ReviewBeforeRenew - Committed)**  
MHP00000005086

TransACT

View Service History Apply Payment

Policy Number: MHP00000005086	Written Premium: \$5,836.00	Effective Date: 1/23/2008	Risk State: UT
Status: InForce	Payment Plan: Six Installments	Expiration Date: 1/23/2009	Rate Effective Date: 1/28/2008
Product: HPBoat_HPBoat	Billing Method: Direct Bill	Equity Date:	Last Modified Date: 2/26/2008
Term: 12 Months		Grace Equity Date:	

<b>Insured:</b> BUD LIGHT 1 MAIN ST Boneta, UT 84001 262-548-9880	<b>Producer:</b> 90700 - 0000001 AMERICAN UNDERWRITING MGRS P O BOX 906 PEWAUKEE, WI 53072-0906 800-236-2862	<b>Agency:</b> 90700 AMERICAN UNDERWRITING MGRS P O BOX 906 PEWAUKEE, WI 53072-0906 800-236-2862
---	---	---

Review Before Renew has been Completed.

Transaction Type:

Quick Filter:

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	1/23/2008	1/23/2009	\$3,511.00	\$3,511.00	Committed	HPLevel2IntUser	1/28/2008
Endorse	1/28/2008	1/23/2009	\$5,836.00	\$2,325.00	Committed	HPLevel2IntUser	1/28/2008
ReviewBeforeRenew	2/26/2008	1/23/2009	\$5,836.00	\$0.00	Committed	kramsby	2/26/2008

Done Local Intranet

Review before Renew transaction now shows as Committed which means this process is now complete.

## RENEW

The Renew function in TransACT is used for either manually renewing the policy OR pre-staging the upcoming renewal with information that needs to be used by the system during the automatic renewal process.

Instructions follow for how to process each type of renewal function. Please ensure that you are processing the renewal in the appropriate manner.

### Renewal Prep:

This is pre-staging renewal changes that will get picked up during the normal renewal batch processing cycle. Renewal has a status of 'Scheduled'.

### Manually Renew:

This is actually renewing the policy before the normal renewal process would have applied. Renewal has a status of 'Committed'.

## Policy Transaction: Renewal Prep

1. Choose the Renew transaction and click "Go".

The screenshot displays the TransACT Master 2.10 web application in a Microsoft Internet Explorer browser window. The address bar shows the URL: http://maimagicdct:8080/Express21/default.aspx. The application header includes navigation links: Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, and Logout. The main content area is titled "TransACT Master 2.10 Current Association: Internal Users (change)". Below this, there's a section for "Diary/Attachments" and a user profile for "danny noonan (InForce - New - Committed)" with ID "MSB00000000409".

The "TransACT" section contains a table with policy details:

Policy Number:	Written Premium:	Effective Date:	Risk State:
MSB00000000409	\$673.08	02-09-2007	KY
Status: InForce	Payment Plan: Six Installments	Expiration Date: 02-09-2008	Rate Effective Date: 02-09-2007
Product: SmallBoat_SmallBoat	Billing Method: Agency Renewal	Equity Date:	Last Modified Date: 02-09-2007
Term: 12 Months		Grace Equity Date:	

Below the table, the insured and agency information is listed:

**Insured:**  
danny noonan  
9999test case st  
Lexington, KY 40511  
444-444-4444

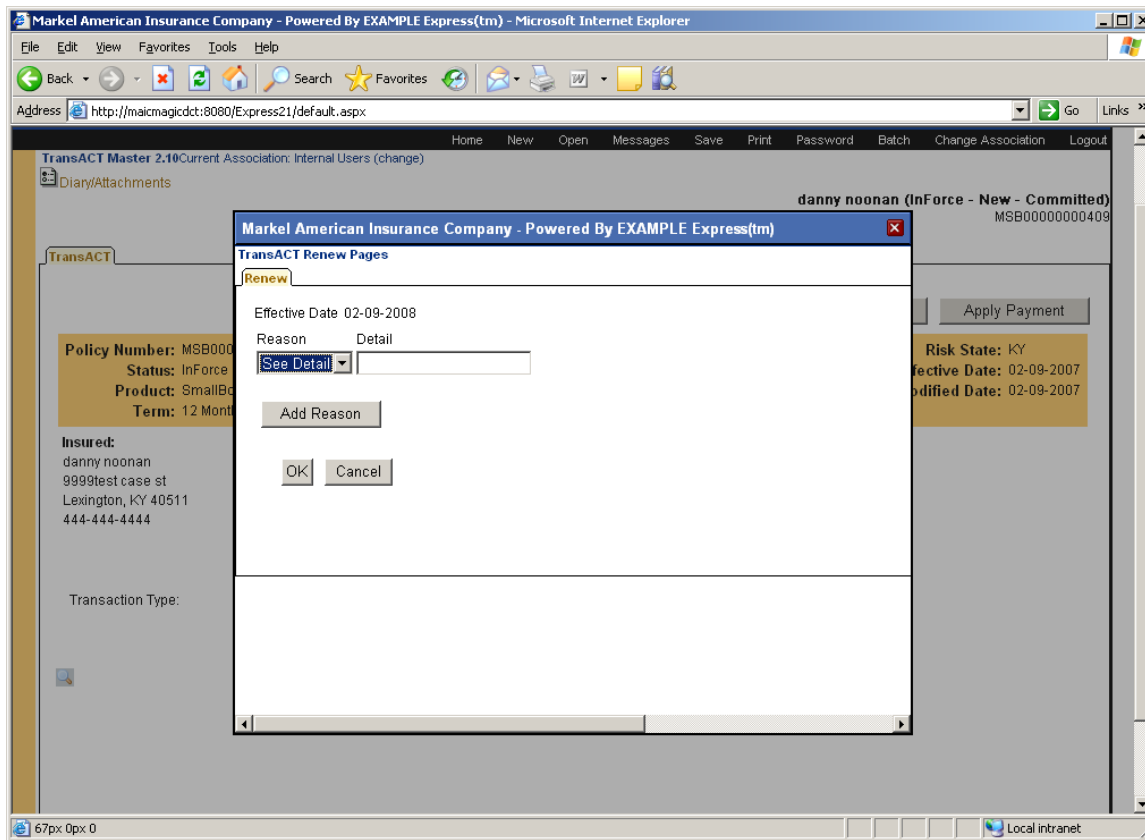
**Agency:**  
T\_E1SubAgency

Transaction Type:   Quick Filter:

A table at the bottom shows transaction details:

Type	Effective Date	Total Written	Written Change	Status	Last Modified by
New	02-09-2007	\$673.08	\$673.08	Committed	jfredrick

2. The effective date is the policy effective date of the renewal term.
3. Put the reason for why you are staging future changes to this policy (that will be picked up in the renewal batch processing).



4. Click "Cancel" to return to TransACT without renewal prepping the policy OR,
5. Click "OK" which will move you forward in the process by taking you into the policy so that you can make your changes.
6. After you have made the necessary changes to the policy, go to the [Submission Screen](#) (as shown below) and click the "Renewal Prep" button which will return you to the [TransACT Screen](#).

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://maimagicdct:8080/Express21/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Messages Save Print Password Batch Change Association Logout

MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)

Diary/Attachments

**danny noonan (InForce - Renew-Pending)**  
MSB00000000409

Owner Personal Boat Operator Assignment Coverage Issue Operator Info Issue Unit Info Additional Interest Info **Submission**

**Rating Messages**

- This context is not approved to set the status to Referred.
- This context is not approved to set the status to Approved.
- This context is not approved to set the status to Declined.
- This context is not approved to set the status to Pending.

**Name:** danny noonan **Renew /** 02-09-2008

**Premiums**

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$673.08	\$673.08	\$0.00	\$673.08

**Available Actions**

Complete Issuance Renewal Prep

< Back

7. The Renewal Prepped policy shows as a scheduled renewal and will show as committed once the actual renewal has been generated and sent to customer.

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://maimagicdct:8080/Express21/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Messages Save Print Password Batch Change Association Logout

TransACT Master 2.10 Current Association: Internal Users (change)

Diary/Attachments

**danny noonan (InForce - Renew - Scheduled)**  
MSB00000000409

TransACT

View Service History Apply Payment

<b>Policy Number:</b> MSB00000000409	<b>Written Premium:</b> \$673.08	<b>Effective Date:</b> 02-09-2007	<b>Risk State:</b> KY
<b>Status:</b> InForce	<b>Payment Plan:</b> Six Installments	<b>Expiration Date:</b> 02-09-2008	<b>Rate Effective Date:</b> 02-09-2007
<b>Product:</b> SmallBoat_SmallBoat	<b>Billing Method:</b> Agency Renewal	<b>Equity Date:</b>	<b>Last Modified Date:</b> 02-09-2007
<b>Term:</b> 12 Months		<b>Grace Equity Date:</b>	

**Insured:**  
danny noonan  
9999test case st  
Lexington, KY 40511  
444-444-4444

**Agency:**  
ga123 - t1sub  
T\_E1SubAgency

Transaction Type: Renew Go Quick Filter: All

Type	Effective Date	Total Written	Written Change	Status	Last Modified by
New	02-09-2007	\$673.08	\$673.08	Committed	jfredrick
Renew	02-09-2008	\$673.08	\$673.08	Scheduled	scisz

## Policy Transaction: Manually Renewing a Policy

1. Choose the Renew transaction and click “Go”.

**Note: You cannot perform this action on a policy that already has a scheduled renewal. You must abort the scheduled renewal first, before manually renewing policy.**

The screenshot displays the TransACT Master 2.10 web application within a Microsoft Internet Explorer browser window. The browser's address bar shows the URL: http://maimagicdct:8080/Express21/default.aspx. The application's title bar reads "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer".

At the top of the application, a navigation bar includes links for Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, and Logout. Below this, a status bar indicates the current association is "Internal Users (change)".

The main content area is titled "TransACT" and displays the following information:

- Policy Number:** MSB00000000409
- Status:** InForce
- Product:** SmallBoat\_SmallBoat
- Term:** 12 Months
- Written Premium:** \$673.08
- Payment Plan:** Six Installments
- Billing Method:** Agency Renewal
- Effective Date:** 02-09-2007
- Expiration Date:** 02-09-2008
- Equity Date:**
- Risk State:** KY
- Rate Effective Date:** 02-09-2007
- Last Modified Date:** 02-09-2007

Below the policy details, the insured's information is listed:

**Insured:**  
danny noonan  
9999test case st  
Lexington, KY 40511  
444-444-4444

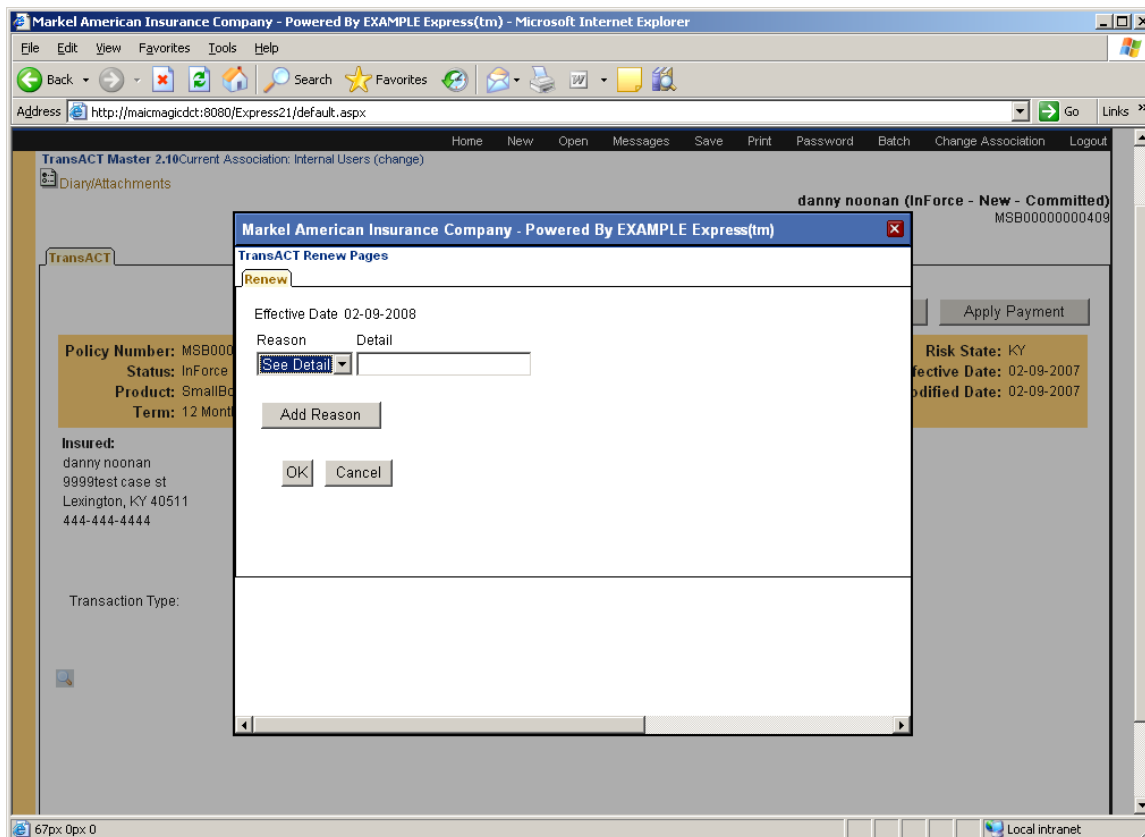
**Agency:**  
T\_E1SubAgency

At the bottom of the form, there is a "Transaction Type" dropdown menu set to "Renew" and a "Go" button. To the right, there is a "Quick Filter" dropdown menu set to "All".

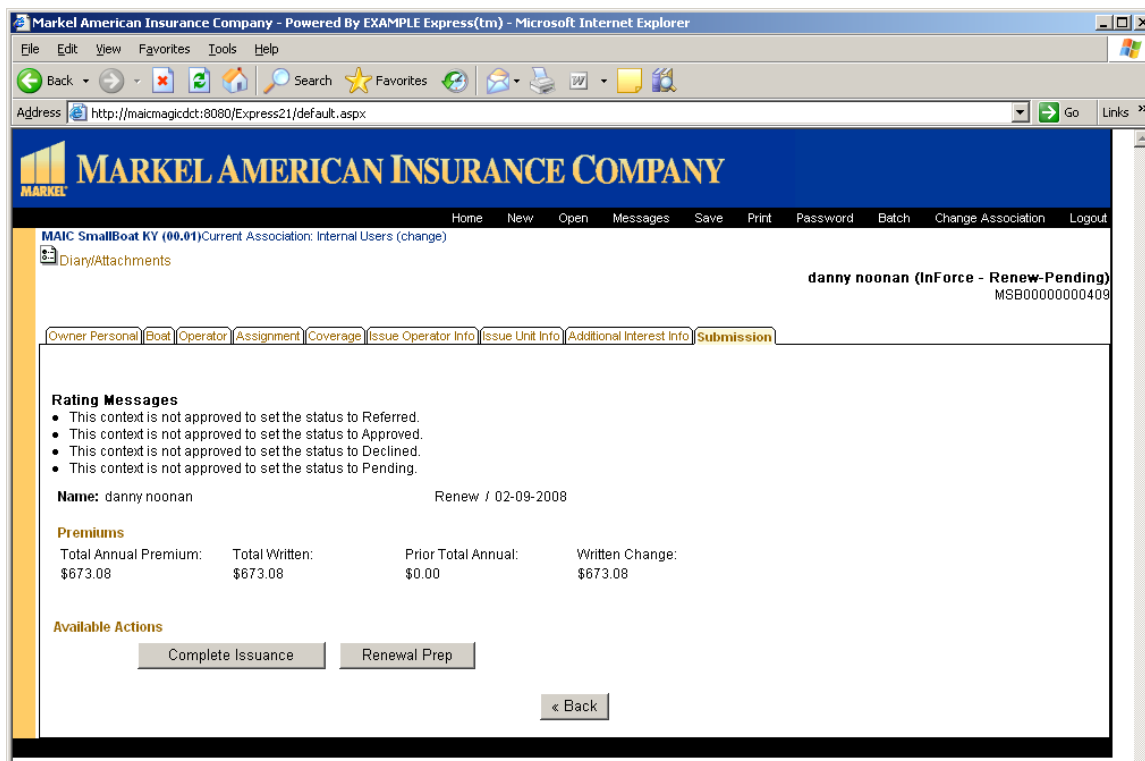
Below the transaction type, a table displays the following data:

Type	Effective Date	Total Written	Written Change	Status	Last Modified by
New	02-09-2007	\$673.08	\$673.08	Committed	jfredrick

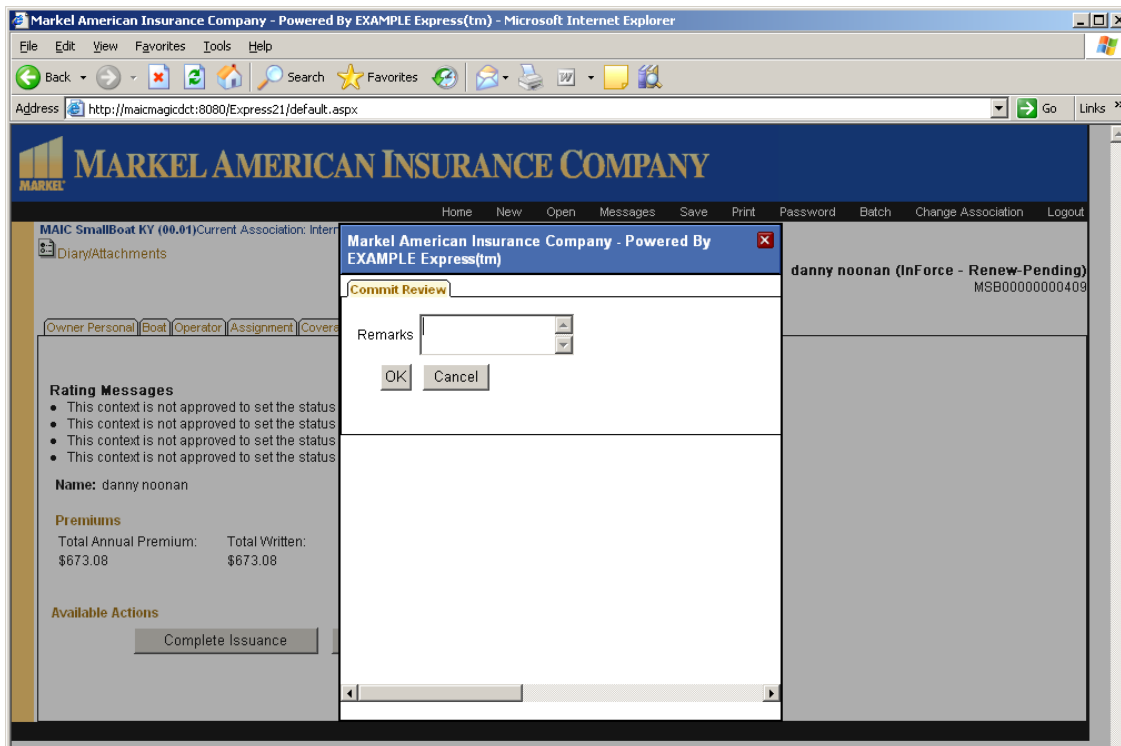
2. The effective date is the policy effective date of the renewal term.
3. Put the reason for manually renewing the policy before the normal renewal process would have applied (see screen shot that follows).
4. Click “Cancel” to return to TransACT without renewing the policy OR,
5. Click “OK” which will move you forward in the process by taking you into the policy for any potential changes. (See Screen shot below)



- After you have made any change to the policy, go to the [Submission Screen](#) and click "Complete Issuance" to be taken to the [Remarks Screen](#).



**Note:** The use of the Renewal Prep button is found in documentation of Renewal Prepping a Policy.



7. Put in your remarks on why you are renewing this policy ahead of time.
8. Click “OK” to complete this transaction and return to the [TransACT Screen](#) OR,
9. Click “Cancel” to move back a step and return to the [Submission Screen](#).

The Policy has been renewed from 2-9-2008 to 2-9-2009.

## NON-RENEW

1. Select the Non-renew transaction which will only be available on Inforce policies. Click “Go”.

The screenshot shows the TransACT Master 2.10 web application running in Microsoft Internet Explorer. The browser address bar shows <http://maimagicdct:8080/Express21/default.aspx>. The application header includes navigation links: Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, and Logout. The main content area displays policy information for 'Daffy Duck (InForce - New - Committed)' with policy number MSB00000000429.

**Policy Information:**

<b>Policy Number:</b> MSB00000000429	<b>Written Premium:</b> \$251.14	<b>Effective Date:</b> 02-10-2007	<b>Risk State:</b> KY
<b>Status:</b> InForce	<b>Payment Plan:</b> Two Installments	<b>Expiration Date:</b> 02-10-2008	<b>Rate Effective Date:</b> 02-13-2007
<b>Product:</b> SmallBoat_SmallBoat	<b>Billing Method:</b> Agency Renewal	<b>Equity Date:</b>	<b>Last Modified Date:</b> 02-13-2007
<b>Term:</b> 12 Months	<b>Grace Equity Date:</b>		

**Insured:** Daffy Duck  
woo hoo  
456-789-1235

**Agency:** MM\_E1SubAgency

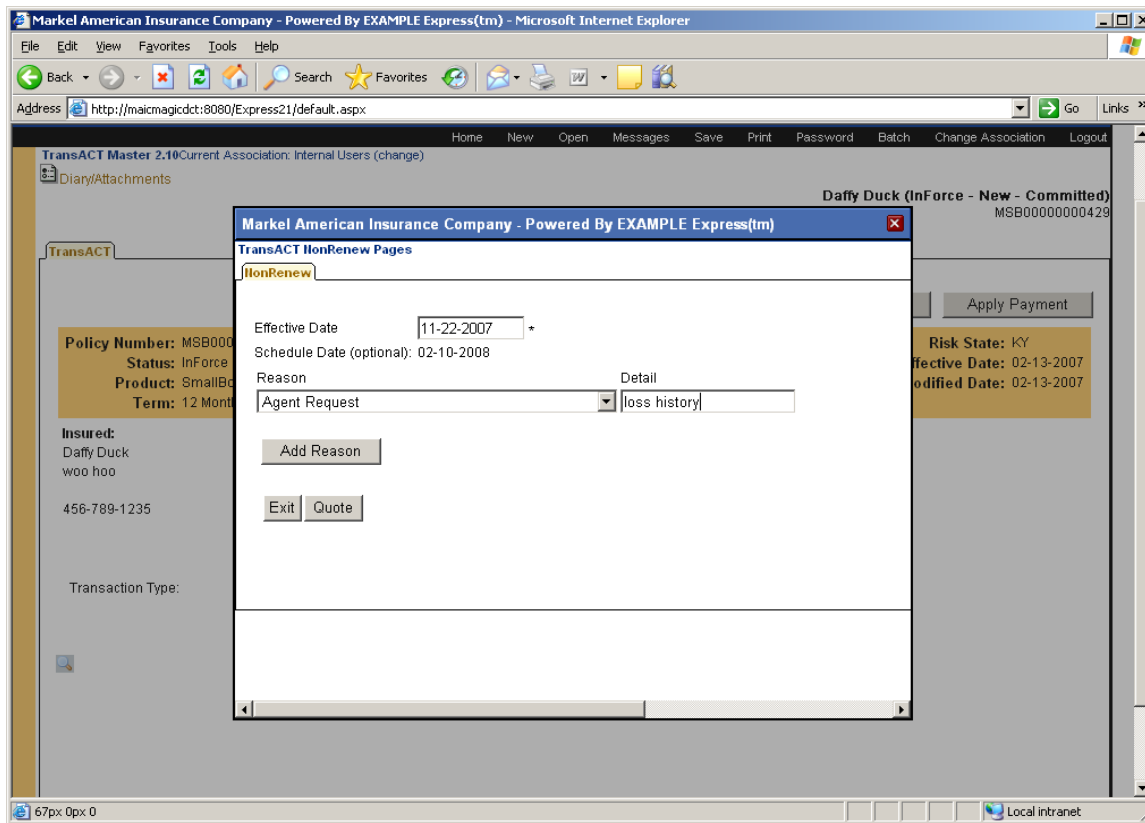
**Transaction Type:** Non-Renew (selected in dropdown) **Go**

**Quick Filter:** All (selected in dropdown)

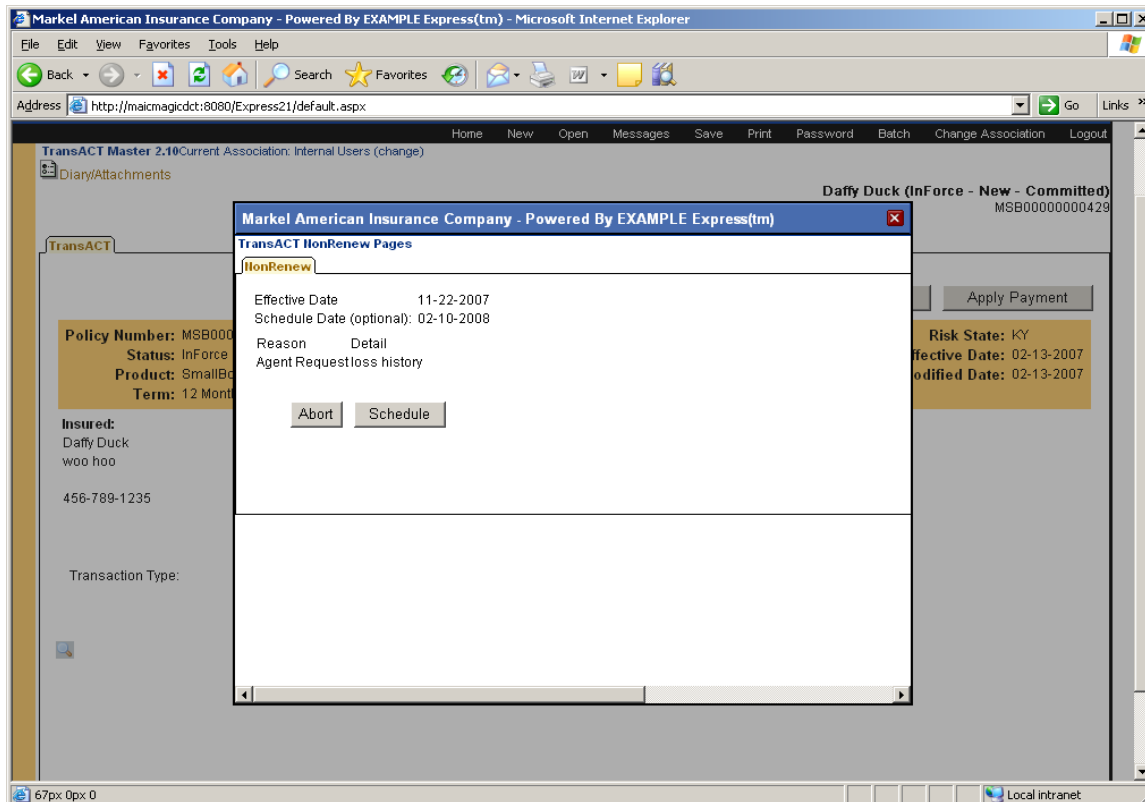
Type	Effective Date	Total Written	Written Change	Status	Last Modified by
New	02-10-2007	\$251.14	\$251.14	Committed	possmann

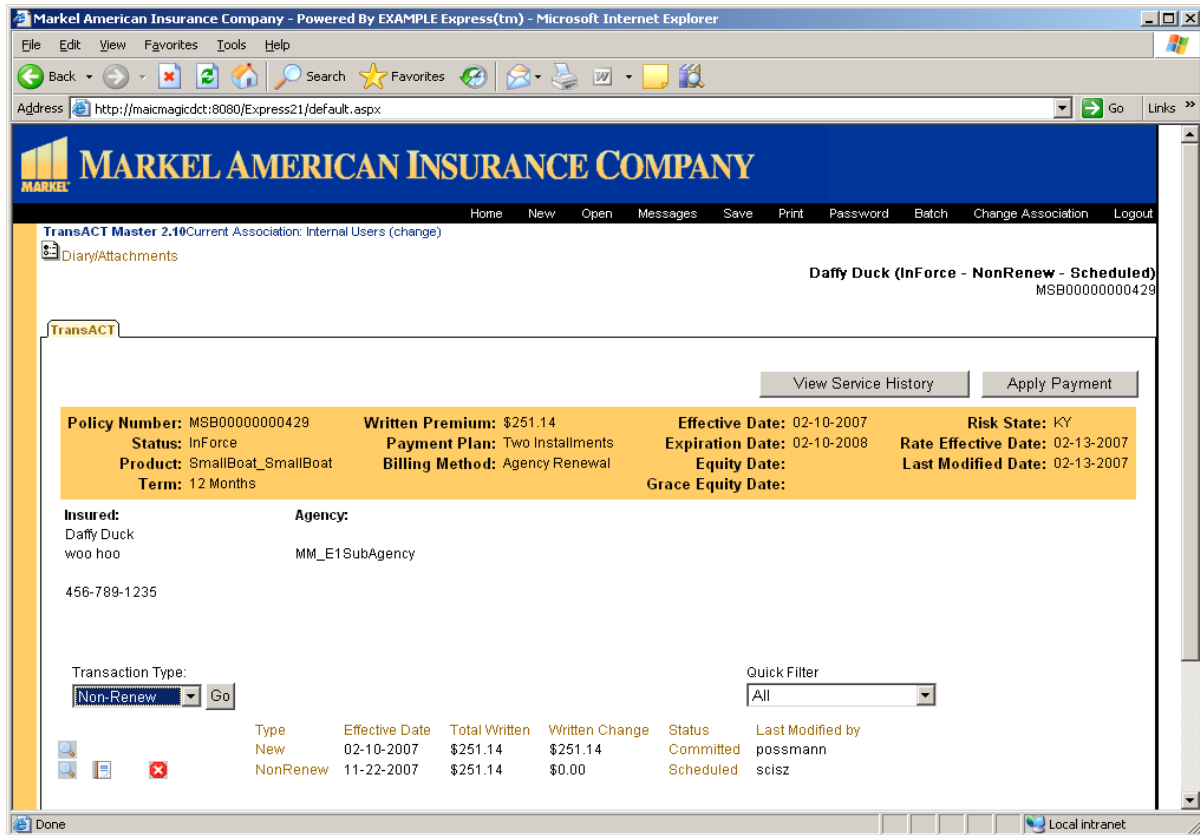
The effective date will be filled in by the system based on proper days notice per the state for non-renewal. The notice will be mailed the next day after this date.

The Scheduled date will be filled in by the system as the policy expiration date.



2. Choose Reason.
3. Enter reason specifics in the Detail field.
4. Click "Abort" to cancel this transaction and return to the [TransACT Screen](#) OR click "Schedule" to proceed with this transaction





The **TransACT Screen** now shows that this policy has been scheduled for Non-renewal. Once the policy expiration date has passed, the non-renewal transaction will now show as 'Committed'.

## VIEW SERVICE HISTORY

On the [TransACT Screen](#), there is a “View Service History” button. Clicking on this button will bring up a series of 4 screens:

- Claims History,
- Payment History
- Refund History
- Service History

Market American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: https://maicmgcwebint1:8085/Express21/default.aspx

TransACT Master 2.10 Current Association: Internal Users (change)

Diary/Attachments

Ray Stantz (InForce - Reinstate - Committed)  
MSB00000000372

TransACT

**View Service History** Apply Payment

**Policy Number:** MSB00000000372 **Written Premium:** \$191.00 **Effective Date:** 02-08-2007 **Risk State:** WI  
**Status:** InForce **Payment Plan:** Full Pay **Expiration Date:** 02-08-2008 **Rate Effective Date:** 02-08-2007  
**Product:** SmallBoat\_SmallBoat **Billing Method:** **Equity Date:** **Last Modified Date:** 02-08-2007  
**Term:** 12 Months **Grace Equity Date:**

**Insured:** Ray Stantz **Agency:** Internal Users  
5124 Idlewild  
222-222-2222 123-123-1223

Transaction Type: Cancel Go Quick Filter: All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	02-08-2007	02-08-2008	\$191.00	\$191.00	Committed	admin	02-08-2007
Cancel	02-08-2007	02-08-2008	\$0.00	-\$191.00	Committed	admin	02-08-2007
Reinstate	02-08-2007	02-08-2008	\$191.00	\$191.00	Committed	admin	02-08-2007

Local intranet

## CLAIMS HISTORY

The [Claims History Screen](#) will display any Claim information associated with the policy. In the example shown below, there is a claim on the policy (see the green box). The Claim #, date of loss, claimant name, status, examiner, etc. are all displayed.

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://maimcgcwebint1:8085/Express21/default.aspx> Go Links

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Messages Save Print Password Batch Change Association Logout

MAIC SmallBoat WI (00.01) Current Association: Internal Users (change)

Diary/Attachments

Service History **Claims History** Payment History Refund History

**Service History**

**Policy Number:** MSB00000000372 **Premium Written:** \$191.00 **Effective Date:** 02-08-2007 **Risk State:** WI  
**Status:** In Force **Payment Plan:** Full Pay **Expiration Date:** 02-08-2008 **Rate Effective Date:** 02-08-2007  
**Product:** SmallBoat\_SmallBoat **Billing Method:** **Equity Date** **Last Modified Date:** 02-08-2007  
**Term:** 12 Months **Grace Equity Date**

**Insured:** Ray Stantz  
5124 Idlewild  
222-222-2222

**Agency:** -  
Internal Users  
this carrier address1  
123-123-1223

Claim #	Loss Date	Reported Date	Claimant Name	Status	Closed Date	Coverage	Loss Pd	Examiner	Cause Of Loss
07C0126	02-08-2007	02-08-2007	Ray Stantz	Open		WatercraftLiability	<input type="checkbox"/>	Wayne Nettesheim	CBO

Return

< Back Next >

Done Local intranet

By clicking the “Return” button from this screen you will be taken back to the main [TransACT Screen](#).

Clicking “Next” or clicking the Payment History Tab, will take you to the [Payment History Screen](#).

## PAYMENT HISTORY

The [Payment History Screen](#) will display any payments applied to the policy, the installment schedule and the amounts due.

**Policy Number:** MSB00000002015    **Premium Written:** \$223.00    **Effective Date:** 03-08-2007    **Risk State:** FL  
**Status:** In Force    **Payment Plan:** Two Installments    **Expiration Date:** 03-08-2008    **Rate Effective Date:** 03-08-2007  
**Product:** SmallBoat\_SmallBoat    **Billing Method:** Direct Bill    **Last Modified Date:** 03-08-2007  
**Term:** 12 Months    **Equity Date:**    **Grace Equity Date:**

**Insured:**  
test florida  
123 main st  
414-555-3232

**Agency:**  
- 000804

**Amounts Due**

<b>Unpaid Prem</b>	\$111.50
<b>Unpaid Fees</b>	\$0.00
<b>Current Due</b>	\$0.00
<b>Past Due</b>	\$0.00
<b>Total Due</b>	\$111.50

**Installment Schedule**

Bill Date	Prem Due	Inst Fee	Total Due	Pmt Amt	Writeoff	Is Billed
03-08-2007	\$111.50	\$3.00	\$114.50	\$114.50	\$0.00	<input type="checkbox"/>
05-07-2007	\$111.50	\$0.00	\$111.50	\$0.00	\$0.00	<input type="checkbox"/>

**Payment History**

Policy Effective Date	Entered	Pay Type	Ref #	Control #	Payment	NSF Date
03-08-2007	03-13-2007	CH		1741349	\$114.50	

[Return](#)    [« Back](#)    [Next »](#)

The **Amounts Due** section displays the Unpaid Premium, Unpaid Fees, Current Due, Past Due and Total Due.

The **Installment Schedule** section displays the date due, premium due, installment fees and payment amounts applied to the billing dates.

The **Payment History** section displays the policy effective date, payment type, a reference number (if applicable), a control number, the amount of the payment and an NSF Date (if applicable).

By clicking the “Return” button from this screen you will be taken back to the main [TransACT Screen](#).

Clicking “Next” or clicking the Refund History Tab, will take you to the [Refund History Screen](#).

## REFUND HISTORY

The [Refund Screen](#) will show the date of the refund, the payee, the amount and a reference number.

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail New Window Help

Address http://maicmagicdct:8080/Express21/default.aspx

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Messages Save Print Password

MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)

Diary/Attachments

Claims History Payment History **Refund History**

**Refund History**

<b>Policy Number:</b> MSB00000000546	<b>Status:</b> In Force	<b>Product:</b> SmallBoat_SmallBoat	<b>Risk State:</b> KY
<b>Effective Date:</b> 02-22-2007	<b>Expiration Date:</b> 02-22-2008	<b>Term:</b> 12 Months	<b>Rate Effective Date:</b> 02-22-2007
<b>Equity Date</b>	<b>Grace Equity Date</b>	<b>Last Modified Date:</b> 02-22-2007	
<b>Premium Written:</b> \$250.06	<b>Payment Plan:</b> Two Installments	<b>Billing Method:</b> Agency Renewal	

**Insured:**  
View With Quote  
sdoifj  
Williamstown, KY 41097  
654-987-3212

**Agency:**  
12345 - 123-MMSub  
MM\_E1SubAgency  
test my address

Date	Payee	Amount	Reference Number
03-05-2007	DB	\$389.50	0000079187

[Return](#)

[« Back](#)

By clicking the “Return” button from this screen you will be taken back to the main [TransACT Screen](#).

## SERVICE HISTORY

The [Refund Screen](#) will display the Service history of the policy.

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://maimagicdct:8080/Express21/default.aspx

MARKEL AMERICAN INSURANCE COMPANY

Home New Open Messages Save Password Batch Logout

MAIC SmallBoat FL (00.02) Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

Claims History Payment History Refund History **Service History**

**Service History**

**Policy Number:** MSB00000004543 **Premium Written:** \$645.39 **Effective Date:** 10-18-2007 **Risk State:** FL  
**Status:** In Force **Payment Plan:** Full Pay **Expiration Date:** 10-18-2008 **Rate Effective Date:** 10-18-2007  
**Product:** SmallBoat\_SmallBoat **Billing Method:** Direct Bill **Equity Date:** 06-30-2008 **Last Modified Date:** 10-18-2007  
**Term:** 12 Months **Grace Equity Date:** 11-17-2007

**Insured:** OST POLICY TEST  
FB 15277  
Barefoot Beach, FL 34134  
262-548-9880

**Producer:** 90700-0000001  
AMERICAN UNDERWRITING MORS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

**Agency:** 90700  
AMERICAN UNDERWRITING MORS  
P O BOX 906  
PEWAUKEE, WI 53072-0906  
800-236-2862

**Amounts Due**

Unpaid Prem \$205.03  
Unpaid Fees \$0.00  
Current Due \$0.00  
Past Due \$0.00  
Total Due \$205.03

**Installment Schedule**

Due Date	Prem Due	Inst Fee	Total Due	Pmt Amt	Writeoff	Is Billed
11-17-2007	\$832.24	\$0.00	\$832.24	\$627.21	\$0.00	<input type="checkbox"/>

**Account Transaction History**

Action	Effective Date	Entered Date	Written	Fees	Taxes	Total Due	Pmt/WO	An. Prem	Booked Date	User ID	Control #
New Business	10-18-2007	10-18-2007	\$621.00	\$0.00	\$6.21	\$627.21	\$0.00	\$627.21		kramsby	
Change	10-18-2007	10-18-2007	\$18.00	\$0.00	\$0.18	\$18.18	\$0.00	\$18.18		kramsby	
Change	01-18-2008	10-18-2007	\$185.00	\$0.00	\$1.85	\$186.85	\$0.00	\$250.48		kramsby	
Change	01-18-2008	10-18-2007	\$13.00	\$0.00	\$0.13	\$13.13	\$0.00	\$250.48		kramsby	
Policy Change	01-18-2008	10-18-2007	-\$185.00	\$0.00	-\$1.85	-\$186.85	\$0.00	-\$250.48		kramsby	
Cash Received	10-18-2007	10-18-2007	\$0.00	\$0.00	\$0.00	\$0.00	\$627.21	\$0.00		kramsby	1949797

[Return](#)

[< Back](#)

The **Amounts Due** section displays the Unpaid Premium, Unpaid Fees, Current Due, Past Due and Total Due.

The **Installment Schedule** section displays the date due, premium due, installment fees and payment amounts applied to the billing dates.

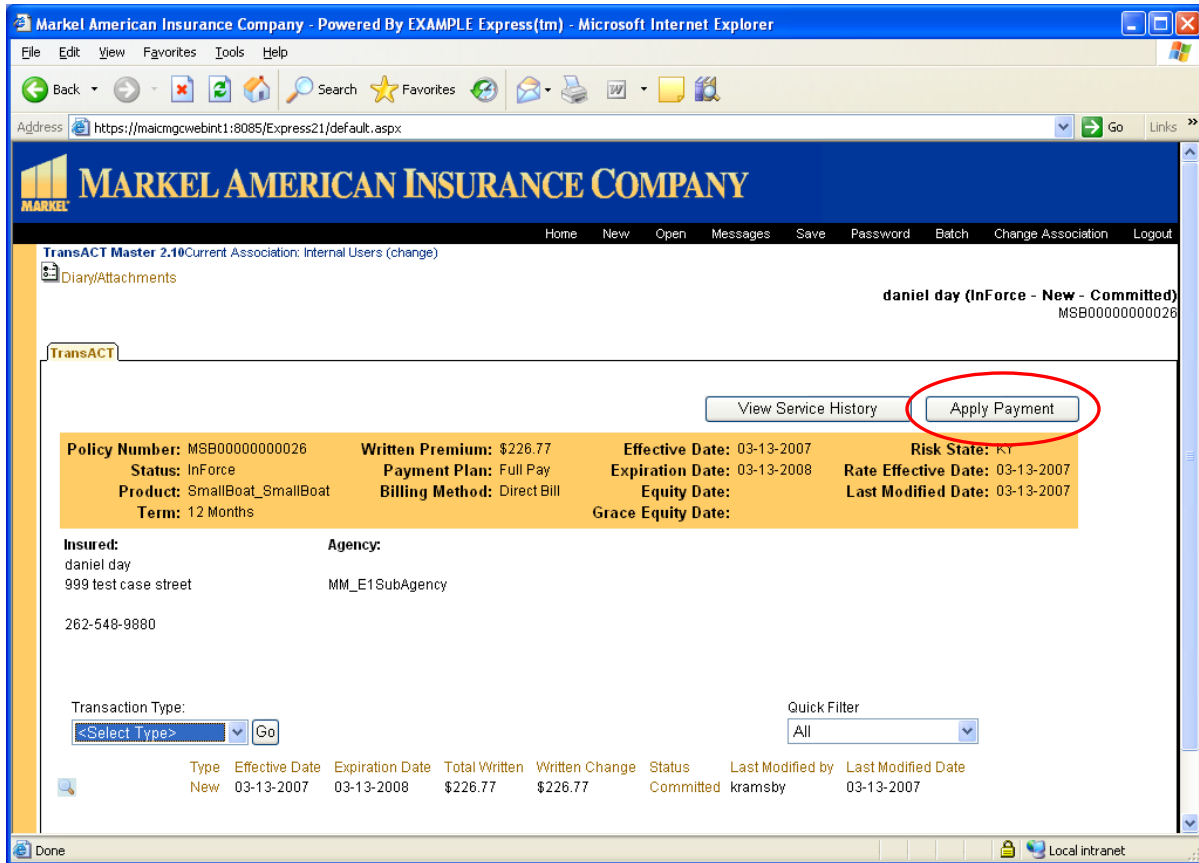
The **Account Transaction History** will show you the actual account transaction history as it happens. It will display write-offs, money being unapplied and re-applied during the cancel/rewrite-reinstatement process, etc. which will give you more information without having to directly contact our Accounting Department.

By clicking the "Return" button from this screen you will be taken back to the main [TransACT Screen](#).

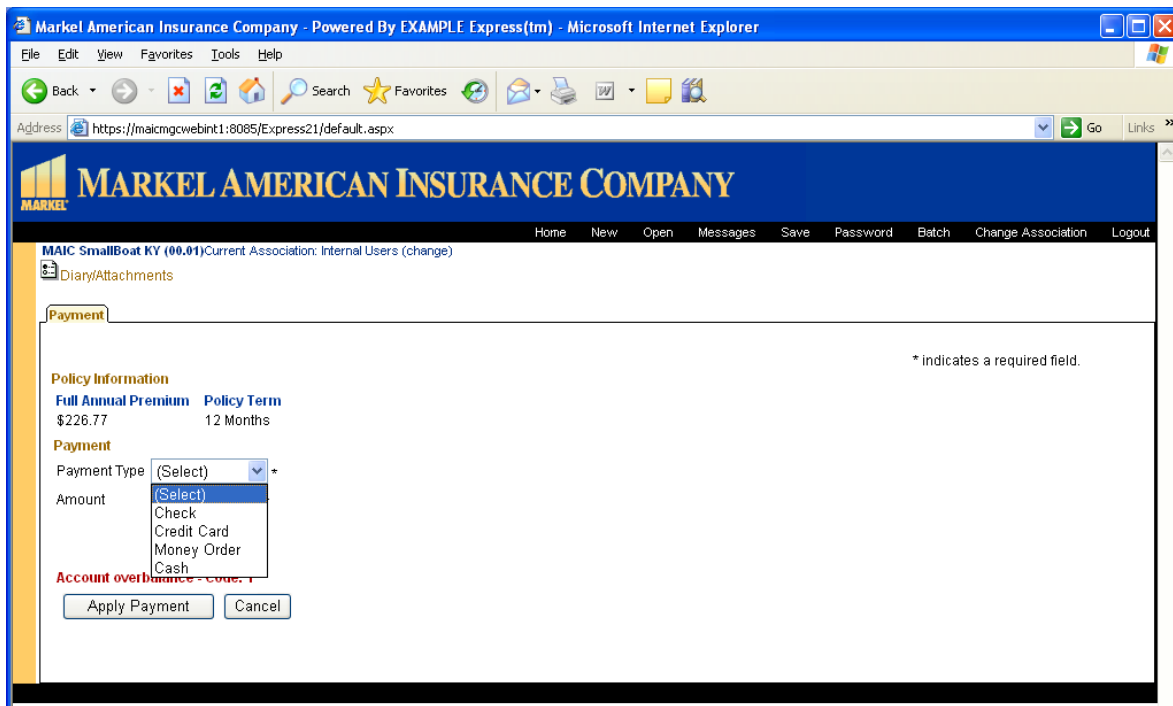
## ACCOUNTING PROCEDURES

### APPLY A PAYMENT TO A POLICY

1. From the [TransACT Screen](#), click the “Apply Payment” button (as shown below).



2. Choose the “Payment Type” from the drop down box (see screen print below).



- **Check**—proceed to [Payment by Check](#) section that follows
- **Credit Card**—proceed to [Payment by Credit Card](#) section that follows
- **Money Order**—proceed to [Payment by Money Order](#) section that follows
- **Cash**—proceed to [Payment by Cash](#) section that follows

## Payment By Check:

1. Enter the amount of the payment in the “Amount” field.
2. Enter the check number in the “Payment Reference #” field.

The screenshot shows a web browser window titled "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://maimagicdct:8080/Express21/default.aspx". The page header includes the Markel logo and the company name "MARKEL AMERICAN INSURANCE COMPANY". Below the header is a navigation bar with links: Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, Logout. The main content area is titled "MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)". Below this is a "Diary/Attachments" section. The "Payment" tab is selected, showing a form with the following fields: "Policy Information" (Full Annual Premium: \$236.17, Policy Term: 12 Months), "Payment Type" (dropdown menu set to "Check"), "Amount" (text box with "236.17"), and "Payment Reference #" (text box with "456"). A note indicates that an asterisk (\*) denotes a required field. At the bottom of the form are "Apply Payment" and "Cancel" buttons.

3. Click “Apply Payment” button to apply the payment or “Cancel” to terminate transaction.

Once all checks have been applied for the day:

1. Complete the “General Agent Daily Deposits Form” see the form that follows.
2. Complete a remote deposit bank account deposit slip (specific per bank).
3. Fax or email both documents to Vivian Wright.

**NOTE:** Only general agents with existing remote deposit bank accounts can apply payments using the “Check” payment type option.

**Agents are required to deposit these funds into their established remote deposit account on a daily basis. Subsequently, these accounts are swept on a monthly basis based on daily deposit activity.**

***All agents are encouraged to utilize the more efficient “Credit Card” option for applying payments to New Business or Active Policies.***

## Payment By Credit Card:

After selecting Credit Card as the payment type, the screen will change appearance as shown in red below.

The screenshot shows a web browser window titled "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://maimagicdct:8080/Express21/default.aspx". The main content area displays a payment form for a policy labeled "MAIC SmallBoat KY (00)". The form shows a payment amount of \$439.43 over 12 months, starting on 02-21-2007. The payment plan is set to "Three Installments" and the payment type is "Credit Card". The amount to be paid is \$201.43. A red box highlights the "Cardholder Information" section, which includes fields for Name, Address, City, Zip Code, and State. Below this is the "Credit Card Information" section with fields for Credit Card Type, Credit Card #, Security Code, and Expiration Date. A "Submit Payment" button is at the bottom of the form. The left sidebar contains links for "Owner Personal", "Boat", "Rating Messages", "Premiums", and "Issue Notes". The right sidebar shows "Association" and "Logout" links.

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://maimagicdct:8080/Express21/default.aspx

MAIC SmallBoat KY (00)

Diary/Attachments

Owner Personal Boat

Rating Messages

- This context is not
- This context is not
- This context is not
- This context is not

Name: Holy Mackere

Premiums

Total Annual Premium: \$439.43

Issue Notes

Remarks

Available Actions

Refer

Payment

\$439.43 12 Months 02-21-2007 (mm/dd/yyyy) View Payment Schedules

Payment Plan: Three Installments

Payment Type: Credit Card

Amount: 201.43 Minimum Payment Amount: \$201.43

Is Cardholder same as Insured? ☐ Yes ☒ No

Cardholder Information

Name \*

Address \*

City \* Zip Code \* State (select) \*

Credit Card Information

Credit Card Type: --Select a Credit Card-- \* Credit Card #: \* Security Code: \*

Expiration Date: (Select) \* / (mm/yyyy)

When you click on the Submit Payment button, credit card payment will be processed.  
Do not click on the button more than once or you risk the credit card being charged multiple times.  
Please wait for the confirmation page which will display when the policy has been issued.

Association Logout

te - New-Pending) QT00000002665

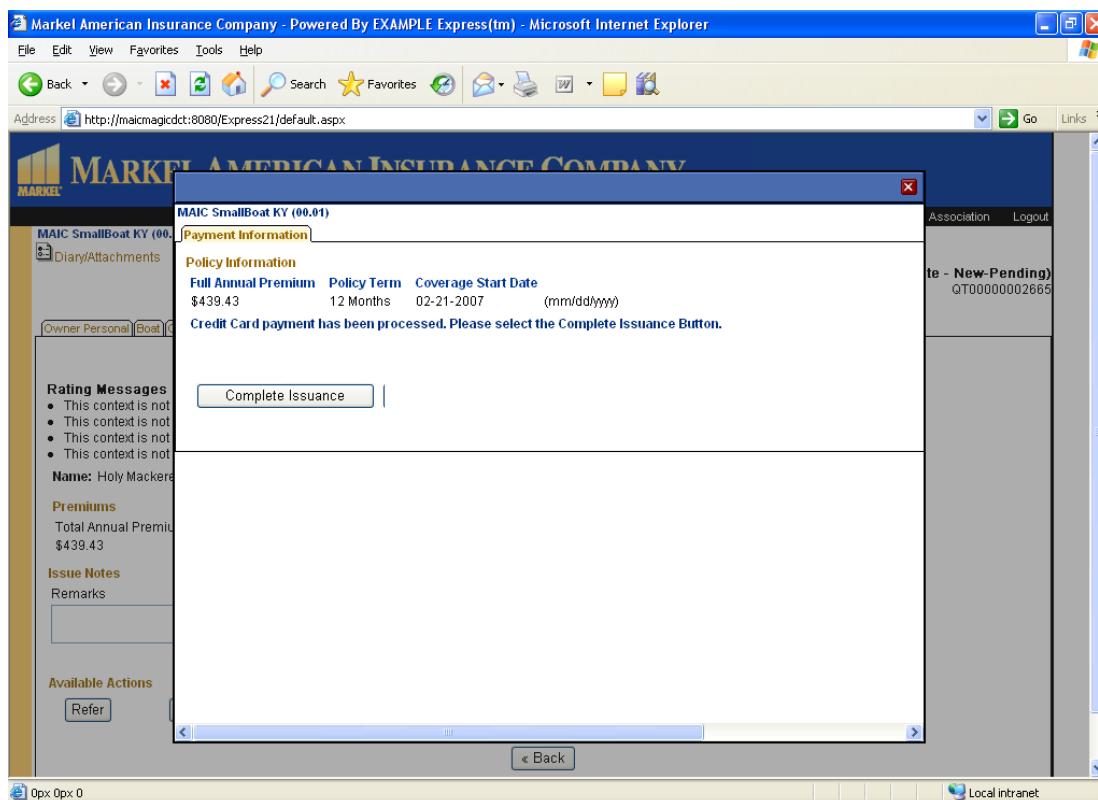
Local intranet

1. If the cardholder is the same as the insured, click 'Yes'. The fields will populate with the applicant's mailing address information.
2. If the cardholder is not the same as the insured, click 'No'.
3. Enter in all of the required credit card information.
4. Once complete, click "Submit Payment".

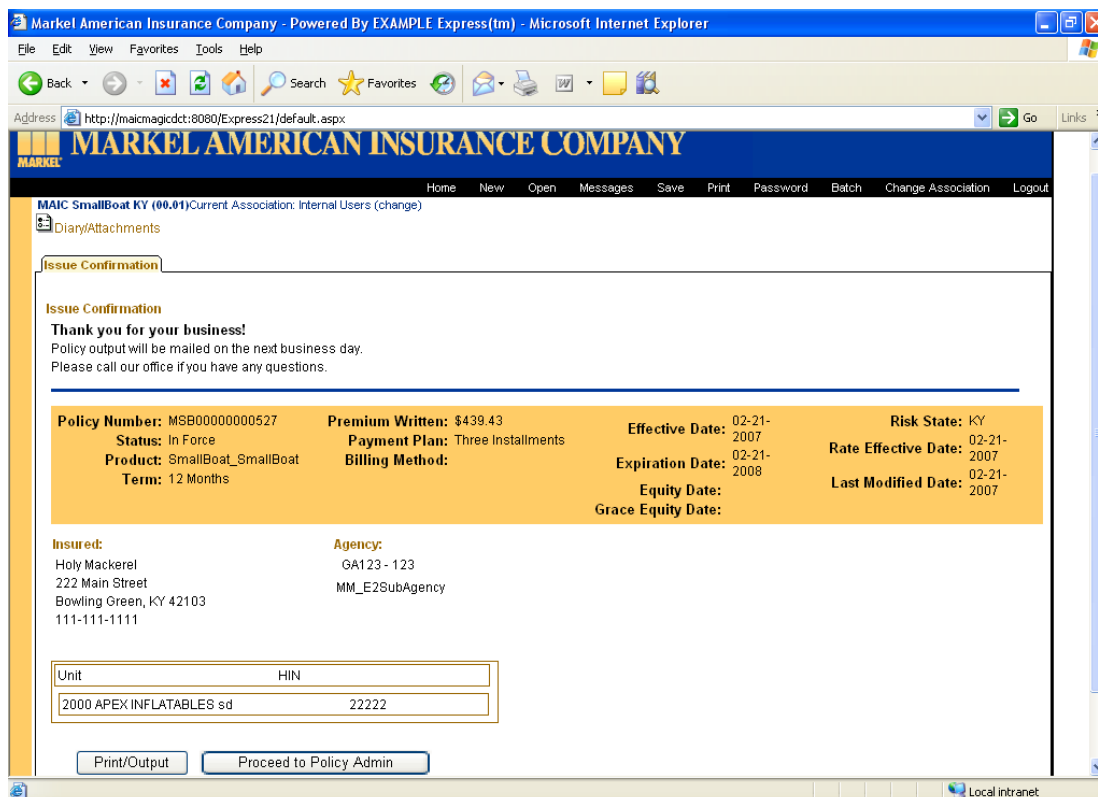
**NOTE: Do not click on the button more than once or you risk the credit card being charged multiple times.**

5. Please wait for the confirmation page (as shown below).

6. Click "Complete Issuance".



7. An **Issue Confirmation Screen** will appear advising that the policy has been issued and that output will be mailed out the next business day. (see below) The assigned policy number will be visible in the upper left-hand corner of the orange summary box.



8. Also, as soon as output is available, it may be printed in your office.
9. At this point, you may exit the policy by starting a new transaction, or proceed to Policy Administration.

## Payment By Money Order:

1. Enter the amount of the payment in the “Amount” field.
2. Enter the money order number in the “Payment Reference #” field.

The screenshot shows a web browser window titled "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://maimagicdct:8080/Express21/default.aspx". The page header includes the Markel logo and the company name "MARKEL AMERICAN INSURANCE COMPANY". Below the header is a navigation bar with links: Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, Logout. The main content area is titled "MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)". Below this is a "Diary/Attachments" section. The "Payment" tab is selected, showing a form with the following fields: "Policy Information" (Full Annual Premium: \$236.17, Policy Term: 12 Months), "Payment Type" (Money Order), "Amount" (236.17), and "Payment Reference #". There are "Apply Payment" and "Cancel" buttons at the bottom. A note indicates that an asterisk (\*) denotes a required field.

3. Click “Apply Payment” button to apply the payment or “Cancel” to terminate transaction.

Once all the money orders have been applied for the day:

1. Complete the “General Agent Daily Deposits Form” see the form that follows.
2. Complete a remote deposit bank account deposit slip (specific per bank).
3. Fax or email both documents to Vivian Wright.

**NOTE:** Only general agents with existing remote deposit bank accounts can apply payments using the “Money Order” payment type option.

**Agents are required to deposit these funds into their established remote deposit account on a daily basis. Subsequently, these accounts are swept on a monthly basis based on daily deposit activity.**

*All agents are encouraged to utilize the more efficient “Credit Card” option for applying payments to New Business or Active Policies.*

## Payment By Cash:

1. Enter the amount of the payment in the “Amount” field.
2. Click “Apply Payment” button to apply the payment or “Cancel” to terminate transaction.

The screenshot shows a web browser window titled "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://maicmagicdct:8080/Express21/default.aspx". The page header includes the Markel logo and the company name "MARKEL AMERICAN INSURANCE COMPANY". A navigation bar contains links: Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, and Logout. The main content area shows "MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)" and a "Diary/Attachments" link. A "Payment" tab is selected, displaying a form with the following fields:

- Policy Information**
  - Full Annual Premium: \$236.17
  - Policy Term: 12 Months
- Payment**
  - Payment Type: Cash (dropdown menu)
  - Amount: 236.17 (text input field)

Buttons for "Apply Payment" and "Cancel" are at the bottom. A note states: "\* indicates a required field."

Once all the cash has been applied for the day:

1. Complete the “General Agent Daily Deposits Form.”
2. Complete a remote deposit bank account deposit slip (specific per bank).
3. Fax or email both documents to Vivian Wright.

**NOTE:** Only general agents with existing remote deposit bank accounts can apply payments using the “Cash” payment type option.

Agents are required to deposit these funds into their established remote deposit account on a daily basis. Subsequently, these accounts are swept on a monthly basis based on daily deposit activity.

*All agents are encouraged to utilize the more efficient “Credit Card” option for applying payments to New Business or Active Policies.*

## APPLY A PAYMENT & ACTIVATE A POLICY

If the Policy is ready to issue (providing you have the Authority or Approval to do so) click the “Complete Issuance” button shown below.

The screenshot shows a web browser window titled "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "https://maicmgcwebint1:8085/Express21/default.aspx". The page header includes the Markel logo and the company name "MARKEL AMERICAN INSURANCE COMPANY". A navigation bar contains links: Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, Logout. The main content area displays "MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)". Below this is a "Diary/Attachments" section. On the right, it says "Scott Drew (Quote - New-Pending)" with a quote number "QT00000002323". A tabbed interface shows "Owner Personal", "Boat", "Operator", "Assignment", "Coverage", "Issue Operator Info", "Risk Location", "Additional Interest Info", and "Submission" (which is selected). The "Submission" tab contains the following information:

**Name:** Scott Drew

**Premiums**

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$355.88	\$355.88	\$0.00	\$355.88

**Issue Notes**

Remarks

Available Actions

Refer **Complete Issuance** Save for Later

« Back

### Complete Issuance:

Clicking the “Complete Issuance” button will load the Payment Information. A Payment box will appear as shown below.

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Address: http://maicmagicdct:8080/Express21/default.aspx

**MAIC SmallBoat KY (00.01)**

**Payment Information**

**Policy Information**

Full Annual Premium: \$439.43    Policy Term: 12 Months    Coverage Start Date: 02-21-2007 (mm/dd/yyyy)    [View Payment Schedules](#)

**Payment**

Payment Plan: (Select)    Payment Type: (select) \*

Amount:    Minimum Payment Amount: \$0.00

[Complete Issuance](#)    [Cancel](#)

[Back](#)

## Payment Information:

At the top of the payment box, the total policy premium is displayed as well as the policy term.

1. Choose the desired Effective Date
2. Click on "View Payment Schedules" to view what installment plans are available based on that premium amount.
3. Pick the chosen payment plan from the drop down box.
4. Choose the Payment Type--**Refer to the specific procedures prior to this section for payment by Cash, Credit Card, Check or Money Order.**
5. Enter the Payment amount, if applicable. The system will advise what the minimum payment amount is.
6. Once the above has been entered, click "Complete Issuance" to finish issuing the policy or "Cancel" to discontinue issuing the policy.
7. An [Issue Confirmation Screen](#) will appear advising that the policy has been issued and that output will be mailed out the next business day. (see below) The assigned policy number will be visible in the upper left-hand corner of the orange summary box.

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Mail Print Address http://maicmagicdct:8080/Express21/default.aspx Go Links >>

**MARKEL AMERICAN INSURANCE COMPANY**

Home New Open Messages Save Print Password Batch Change Association Logout

MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)

Diary/Attachments

**Issue Confirmation**

**Issue Confirmation**  
**Thank you for your business!**  
 Policy output will be mailed on the next business day.  
 Please call our office if you have any questions.

<b>Policy Number:</b> MSB00000000527	<b>Premium Written:</b> \$439.43	<b>Effective Date:</b> 02-21-2007	<b>Risk State:</b> KY
<b>Status:</b> In Force	<b>Payment Plan:</b> Three Installments	<b>Expiration Date:</b> 02-21-2008	<b>Rate Effective Date:</b> 02-21-2007
<b>Product:</b> SmallBoat_SmallBoat	<b>Billing Method:</b>	<b>Equity Date:</b>	<b>Last Modified Date:</b> 02-21-2007
<b>Term:</b> 12 Months		<b>Grace Equity Date:</b>	

**Insured:**  
 Holy Mackerel  
 222 Main Street  
 Bowling Green, KY 42103  
 111-111-1111

**Agency:**  
 GA123 - 123  
 MM\_E2SubAgency

Unit HIN  
 2000 APEX INFLATABLES sd 22222

Print/Output Proceed to Policy Admin

Local intranet

8. At this point, you may exit the policy by starting a new transaction, or proceed to Policy Administration.

### Proceed to Policy Admin:

The "Proceed to Policy Admin" button will take you back to the TransACT screen.

**For Accounting/Check Deposits/etc.**  
**please see the beginning of the Accounting section.**

## USER MAINTENANCE

If changes (deletion or addition) in staffing occur, MAIC must be notified in writing by the agency Principal or other person designated by the Principal to effect user changes.

The Request to Amend Established User document will need be sent to MAIC's Technical Services Dept. at [PTS@markelcorp.com](mailto:PTS@markelcorp.com) or faxed to 262-547-9436. Once they have completed the User change, they will confirm that the user has either been disabled, or if a new user, their new password.

Changes to sub-producer staff should also be communicated in the same manner.

The User change form can be found on [www.markelmarine.com](http://www.markelmarine.com) as well as in the Appendix at the back of this manual.

## AGENT MAINTENANCE

To setup a sub-producer in the system, a written request must be provided by the contracted General Agent. If you intend to provide the MAGIC system to your sub-producer some additional information will be required.

The Request to Add a Sub-Producer form will need to be sent to the BA Group at [PBG@markelcorp.com](mailto:PBG@markelcorp.com). The information necessary to setup the sub-producer will be provided to the contracted General Agent to deliver to the sub-producer.

Once the sub-producer has been established, should Users change, they may be added/deleted using the user change form. (See the previous section regarding User Maintenance.) All User changes should be sent by the General Agent to [PTS@markelcorp.com](mailto:PTS@markelcorp.com).

The Agent Set-up Form can be found on [www.markelmarine.com](http://www.markelmarine.com) as well as in the Appendix at the back of this manual.

## TECHNICAL ASSISTANCE

For technical assistance with the MAGIC system, please contact MAIC's Technical Support Department at 1-800-236-2862 x.3334.

## APPENDIX

Request to Amend Established User

Request to Add a Sub-Producer

# Markel American Insurance Company

## Request to Amend Established User

Email to: [pts@markelcorp.com](mailto:pts@markelcorp.com)

Phone: 800-236-2862

Fax: 262-547-9436

This form is to be utilized for users that are already established in the system. It will be accepted only if completed and submitted by the GA Agency.

**Please complete the following information for the GA Agency:**

<b>GA Name:</b>		<b>GA Number:</b>	
<b>GA Phone:</b>		<b>GA Fax:</b>	
<b>Form Contact Name:</b>		<b>Form Contact Email Address:</b>	

<input type="checkbox"/> Addition	<input type="checkbox"/> Deletion	<i>Username Markel IT Use Only</i>	<i>Password Markel IT Use Only</i>	<i>Date of Activation Markel IT Use Only</i>
User First & Last Name				
Email Address				
<b><i>If change is related to your SubProducer, please complete the following:</i></b>				
<b>SubProducer Name:</b>		<b>SubProducer Number:</b>		

<input type="checkbox"/> Addition	<input type="checkbox"/> Deletion	<i>Username Markel IT Use Only</i>	<i>Password Markel IT Use Only</i>	<i>Date of Activation Markel IT Use Only</i>
User First & Last Name				
Email Address				
<b><i>If change is related to your SubProducer, please complete the following:</i></b>				
<b>SubProducer Name:</b>		<b>SubProducer Number</b>		

<input type="checkbox"/> Addition	<input type="checkbox"/> Deletion	<i>Username Markel IT Use Only</i>	<i>Password Markel IT Use Only</i>	<i>Date of Activation Markel IT Use Only</i>
User First & Last Name				
Email Address				
<b><i>If change is related to your SubProducer, please complete the following:</i></b>				
<b>SubProducer Name:</b>		<b>SubProducer Number</b>		

<input type="checkbox"/> Addition	<input type="checkbox"/> Deletion	<i>Username Markel IT Use Only</i>	<i>Password Markel IT Use Only</i>	<i>Date of Activation Markel IT Use Only</i>
User First & Last Name				
Email Address				
<b><i>If change is related to your SubProducer, please complete the following:</i></b>				
<b>SubProducer Name:</b>		<b>SubProducer Number</b>		

<b>GA Principal / Manager Approval:</b>	
<b>Request Date of Change:</b>	

**MAGIC**  
**Markel American Insurance Company**  
**Request to add a SubProducer**

Email to: pbg@markelcorp.com -or- fax: 262-548-0117

Due to security requirements brought on by the Sarbanes Oxley Act, each of your subproducers must be assigned an individual user ID and password that will be connecting to our system. Complete a separate form for each subproducer. In order for us to begin setting up this Producer remotely, we need the information provided below.

Please complete the following information:

<b>GA Agency Name:</b>		<b>GA Number:</b>	
<b>SubProducer Name:</b>		<b>SubProducer Number:</b>	
<b>SubProducer Federal ID #:</b>		<b>Is SubProducer Incorporated?</b>	<input type="checkbox"/> YES <input type="checkbox"/> NO
<b>SubProducer Website Address:</b>			
<b>SubProducer Address:</b>			
<b>SubProducer City, State &amp; Zip:</b>			
<b>SubProducer Phone:</b>		<b>SubProducer Fax Number:</b>	
<b>Form Contact Name:</b>		<b>Form Contact Email address:</b>	

Producer User First & Last Name	Producer E-Mail Address	Username Markel IT Use Only	Password Markel IT Use Only	Date of Activation Markel IT Use Only